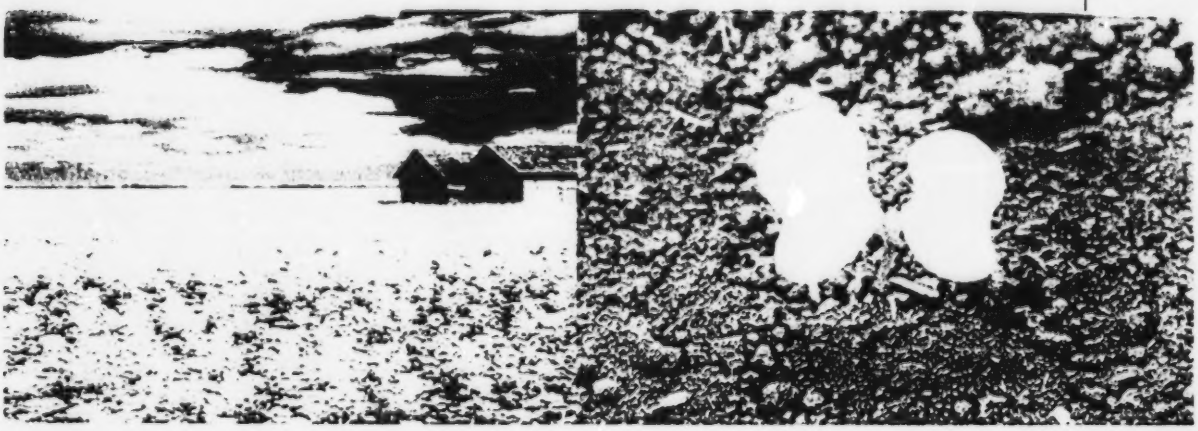
Manitoba Agriculture and Food

Program & Policy Analysis

Manitoba Grains & Oilseeds Industry Profiles



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N/A = not available

Data sources: *Agriculture and Agri-Food Canada*
Canadian Grain Commission
Manitoba Agriculture and Food
Statistics Canada

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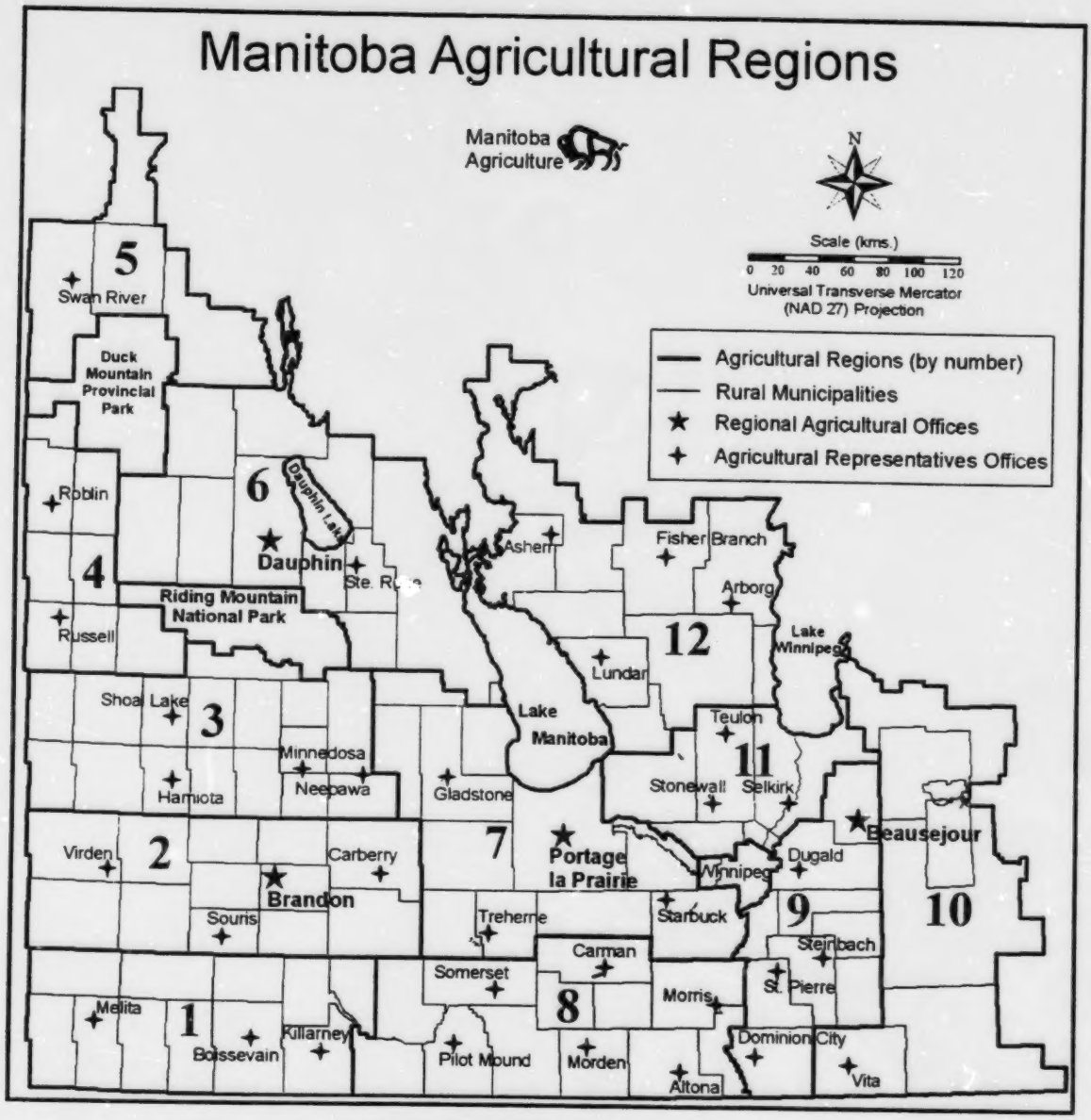


Administrative Region Name	Agricultural Region Numbers
Southwest	1, 2, 3
Northwest	4, 5, 6
Central	7, 8
Eastern/Interlake	9, 10, 11, 12

WHEAT SECTOR

WHEAT SECTOR PROFILE

Production:

The area seeded to wheat in Manitoba peaked in 1990 at 5.46 million acres, of which 5.45 million acres were harvested. The 1990 wheat production of 216.2 million bushels was also a record. For the next five years, wheat plantings decreased in response to relatively low prices. Seeded and harvested areas rose to 4.23 million acres and 4.20 million acres respectively in 1996 after prices improved significantly in 1994/95, but fell to 3.24 million acres in 1998 when prices dropped in late 1996 and again in 1997. Excess soil moisture in the south-western area of the province in spring1999 prevented seeding close to one million acres, some of which would have been wheat. As a result, 3,175,000 acres of wheat were seeded, of which 3,145,000 acres were harvested in Manitoba in 1999, a decrease of 2.6 percent from the 1998 level. Although wheat continues to occupy the largest area of any annual crop in Manitoba, it was the second most valuable crop in the province after canola in 1997, 1998 and 1999.

Production decreased to 116.1 million bushels in 1999, 1.9 percent less than in 1998. Manitoba contributed 11.8 percent of total Canadian wheat production in 1999, down from 13.8 percent in 1997.

Yields averaged 36.9 bushels per acre in 1999 compared to a 10-year average of 34.9 bushels per acre and 36.6 bushels per acre in 1998. The largest average yield on record was 41.4 bushels per acre in 1992.

Almost 89 percent of Manitoba's 1999 wheat crop was Hard Red Spring wheat, 4 percent was Winter wheat, about 2 percent was Prairie Spring, over 3 percent was Extra Strong, 1 percent was Durum, only 0.1 percent was Soft White Spring wheat and 0.4 percent were other varieties.

The late planting and harvesting in 1999 resulted in about 25 percent of Manitoba's wheat crop grading 1CW with about 35 percent grading 2CW and the rest grading 3CW or lower. The average protein content was below the previous two years, which had drier growing conditions.

Average wheat prices rose from $2.85 per bushel in 1993 to a record $5.60 per bushel for the 1995 crop, but fell over the next four years to $3.10 per bushel in 1999, a decrease of 20.5 percent from 1998. The total value of the Manitoba wheat crop was highest in 1985, at $757.8 million, but dropped to a *twenty-year low of $360.2 million* in 1999. The smaller seeded area and production of the 1999 crop and significantly lower average wheat prices contributed to the 21.8 percent drop in crop value from $460.8 million in 1998.

Estimated farm expenses for wheat production increased from $147.28 to $168.06 per acre from 1992 to 1996, declined to $161.20 per acre in 1997, but rose to $172.64 per acre in 1999. These included operating, labour and fixed costs.

Annual cash receipts from the sector showed an upswing from $426.8 million in 1992 to $675.8 million in 1996 and $662.8 million in 1997. Receipts from wheat sales declined to $477.0 million in 1998, but increased marketings of the 1998 wheat crop in 1999 led to a rise in cash receipts to $502.8 million in calendar year 1999. Manitoba's contribution to Canadian wheat receipts fell from 15.0 percent in 1996 to 14.2 percent in 1998, but rose to 15.8 percent in 1999.

Marketing:

Wheat marketings increased from 104.0 million bushels in 1995/96 to 138.3 million bushels in 1996/97, fell to 102.7 million bushels in 1998/99, but rose to 107.7 million bushels in 1999/2000. Wheat carryover increased from 2.0 million bushels in 1997/98 to 3.3 million bushels at the end of the 1999/2000 crop year.

In 1999, there were seven classes of Canadian wheat offered on the world market. *Canada Western Red Spring (CWRS) Wheat* is a hard wheat with superior milling and baking quality offered at various guaranteed levels of protein content, while *Canada Western Red Winter (CWRW) Wheat* is also a hard wheat with excellent milling quality used for products such as French bread, flat bread and steamed bread and certain types of noodles. *Canada Western Amber Durum (CWAD) Wheat* produces a high yield of semolina with excellent pasta-making quality. *Canada Prairie Spring Red (CPSR) Wheat* is used for a wide range of products, such as hearth breads, flat breads, steamed breads and noodles. *Canada Prairie Spring White (CPSW) Wheat*, a medium strength wheat, can be used for flat breads, noodles and chapattis. *Canada Western Extra Strong (CWES) Wheat* has extra gluten suitable for blending purposes and for the production of hearth and pan breads. *Canada Western Soft White Spring (CWSWS) Wheat* is a soft wheat of medium-to-low protein content used for flat breads, noodles, steamed breads, chapattis, cookies, cakes and pastry.

Processing:

Wheat processed into flour, cereal food and feed, pasta, bread and bakery products in 1997 (latest year available) comprised a large component of the total $510 million sales in these categories, compared to sales of $457.7 million and $356.8 million in the two previous years.

Manitoba has three flour mills, A.D.M. Milling Co. in Winnipeg, Harrison Milling and Grain Co. Ltd. in Holmfield and Prairie Flour Mills, constructed at Elie in 1997, the first new mill in the province for many years. These three mills and Pizzey's Milling and Baking Co. in Angusville as well as numerous bakeries employed over 1,000 people to produce an estimated $50 million worth of flour and cereals and $80 million of bread and bakery products in 1998. Local processors of fresh, frozen or dry pasta include Alfonso's Food Products Ltd. and Old Fashioned Noodle Products in Winnipeg and Ackron Egg Farms, Ltd. in Steinbach.

Grain is used to produce ethanol at a plant in Minnedosa, which provides mash for feed as by-product. The Isobord Enterprises straw particle-board plant built at Elie utilises about 185 000 tonnes of straw per year from the surrounding area. The plant employed about 100 people when it became fully operational in 1998.

Trade:

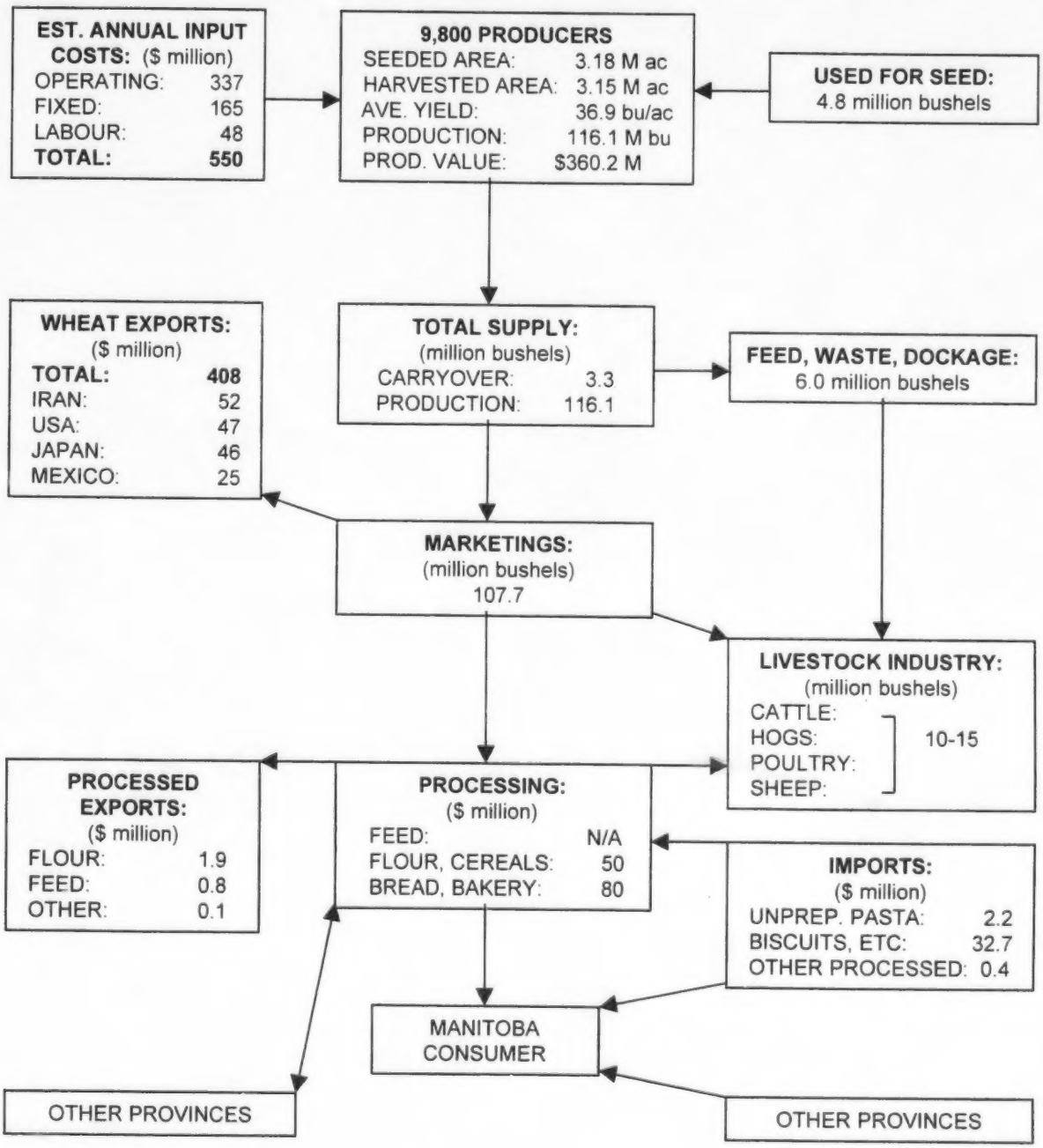
Manitoba wheat exports, sold to 76 other countries mostly in the unprocessed form, decreased from $770 million in 1997 to $410.9 million in 1999. Almost 42 percent of the province's wheat exports in 1999 were shipped to the United States, Iran, Japan and Mexico.

Imports of processed wheat products, such as unprepared pasta and baked goods, have been increasing over the past four years. These products were valued at $35.3 million in 1999, up by 17.3 percent from $30.1 million in 1998.

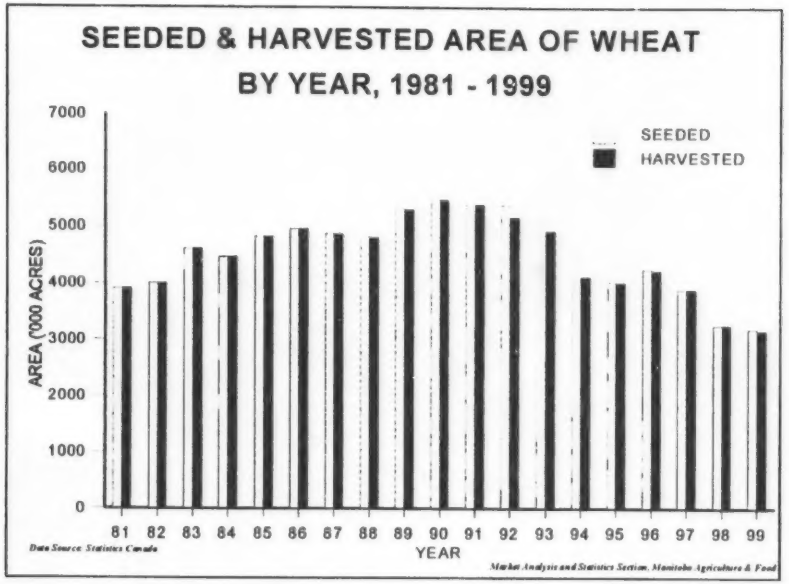
WHEAT AND WHEAT PRODUCTS SECTOR

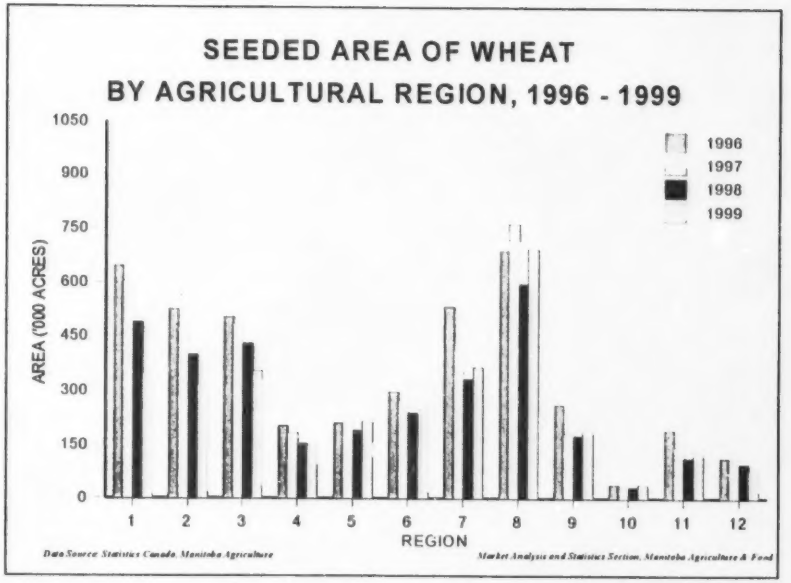
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	12,800	12,000	10,000	9,800	98
CROP PRODUCTION:					
Seeded Area ('000 acres):	4,225	3,880	3,240	3,175	98
% of Canada	13.7	13.7	12.1	12.3	
Harvested Area ('000 acres):	4,200	3,880	3,230	3,145	97
Yield/acre (bushels):	38.3	31.7	36.6	36.9	101
Production (million bushels):	160.8	123.1	118.3	116.1	98
% of Canada	14.4	13.8	13.2	11.8	
Average Price ($/bu):	4.44	3.98	3.90	3.10	79
VALUE OF PRODUCTION ($ million):	713.4	490.3	460.8	360.2	78
ESTIMATED TOTAL EXPENSES ($/acre):	168.06	161.20	164.82	172.64	105
CASH RECEIPTS ($ million):	675.8	662.8	477.0	502.8	105
% of Canada	15.0	14.7	14.2	15.8	
EST. QUALITY (% protein content):	**96/97**	**97/98**	**98/99**	**99/2000**	
All CW Red Spring (CWRS):	14.2	14.9	14.6	14.2	
1CWRS	14.2	14.7	14.3	14.1	
2CWRS	14.3	15.0	14.7	14.2	
3CWRS	13.7	14.7	14.6	14.2	
CW Feed	14.4	15.4	14.9	N/A	
All CW Extra Strong (CWES)	12.9	13.3	13.0	N/A	
All Canada Prairie Spring Red (CPS)	11.5	12.2	N/A	N/A	
All CW Red Winter Wheat (CWRW)	10.8	11.7	N/A	N/A	
All CW Amber Durum (CWAD)	13.3	14.1	13.1	N/A	
CROP DISPOSITION (million bu):	164.3	128.2	120.3	119.4	99
Marketings	138.3	108.3	102.7	107.7	105
Seed Requirements	6.0	5.0	4.8	2.4	50
Feed, Waste & Dockage	14.8	12.9	9.5	6.0	63
Carryover, July 31	5.1	2.0	3.3	3.3	100
PROCESSING ($ million):					
Flour, Cereals, etc	46	50	50	N/A	
Bread, Bakery products	89.5	82.2	80	N/A	
EXPORTS ($ million):	672.4	770.0	455.9	410.9	90
Unprocessed	669.5	763.0	454.6	408.1	90
Processed	2.9	7.0	1.3	2.8	215
IMPORTS ($ million):	18.6	26.3	30.1	35.3	117
Unprocessed	0.14	0.14	0.001	0.01	1,000
Processed	18.5	26.2	30.1	35.3	117

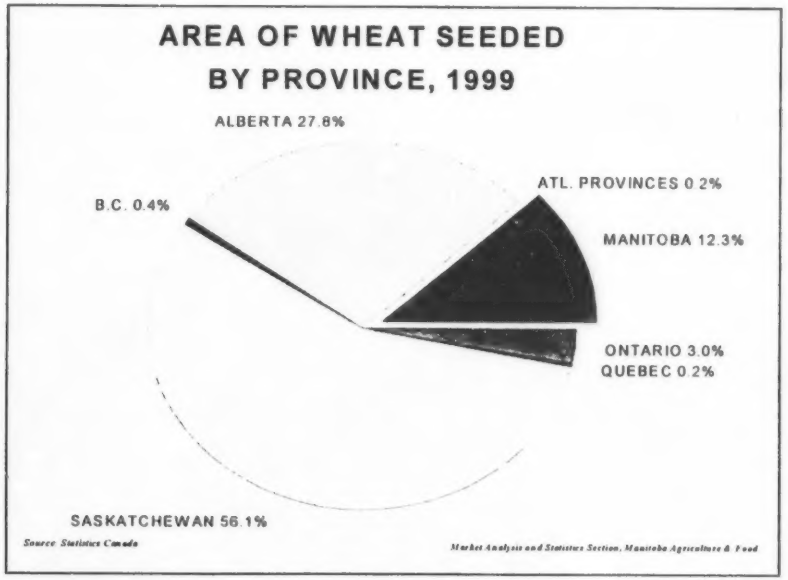
WHEAT INDUSTRY CHART, 1999

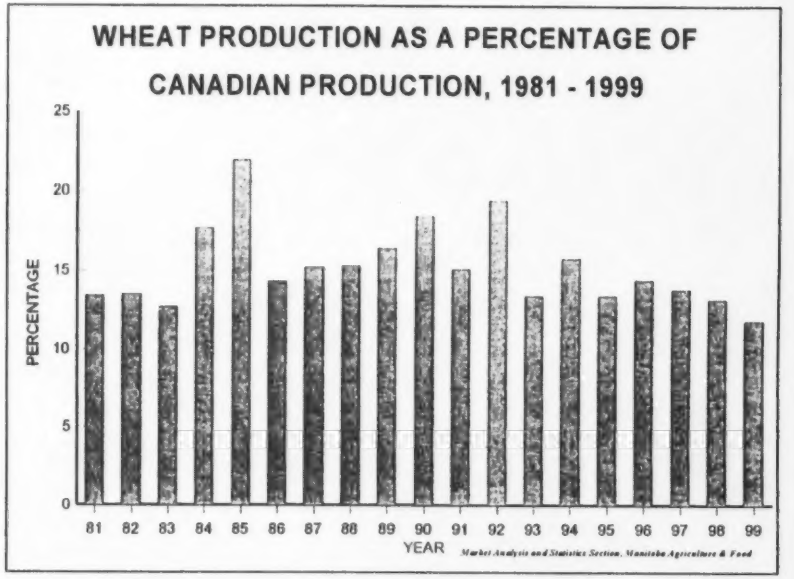


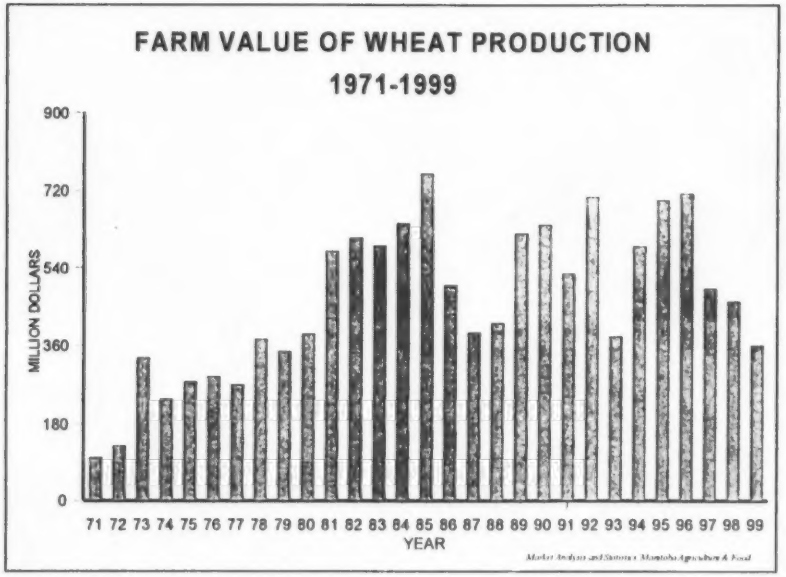
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

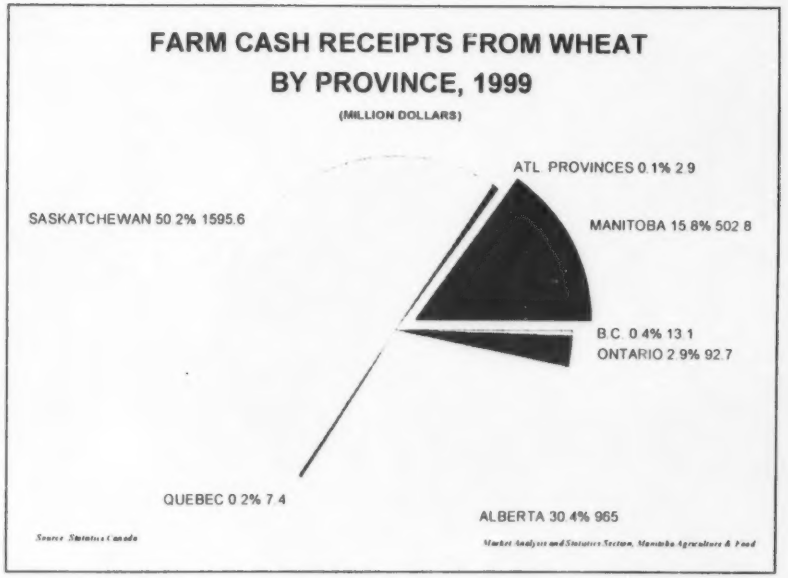

SEEDED & HARVESTED AREA OF WHEAT
BY YEAR, 1981 - 1999
SEEDED
HARVESTED
AREA ('000 ACRES)
7000
6000
5000
4000
3000
2000
1000
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

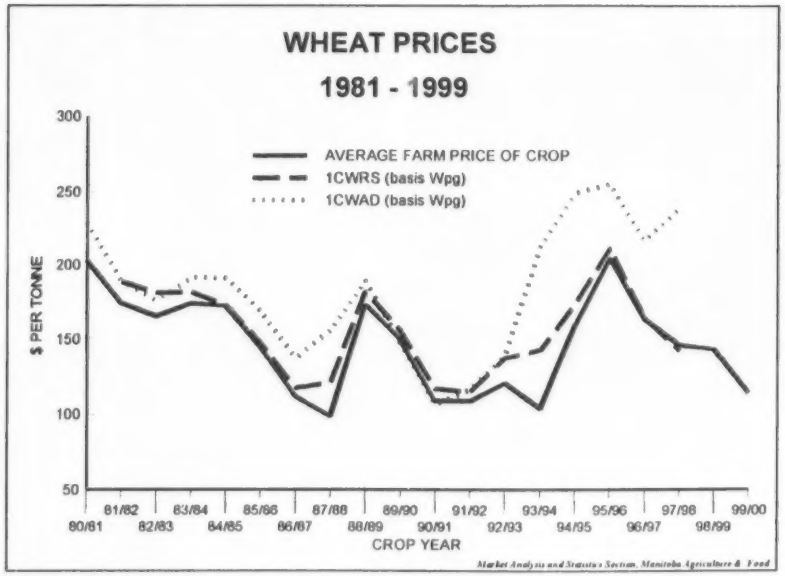

SEEDED AREA OF WHEAT
BY AGRICULTURAL REGION, 1996 - 1999
1996
1997
1998
1999
AREA ('000 ACRES)
1050
900
750
600
450
300
150
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture & Food

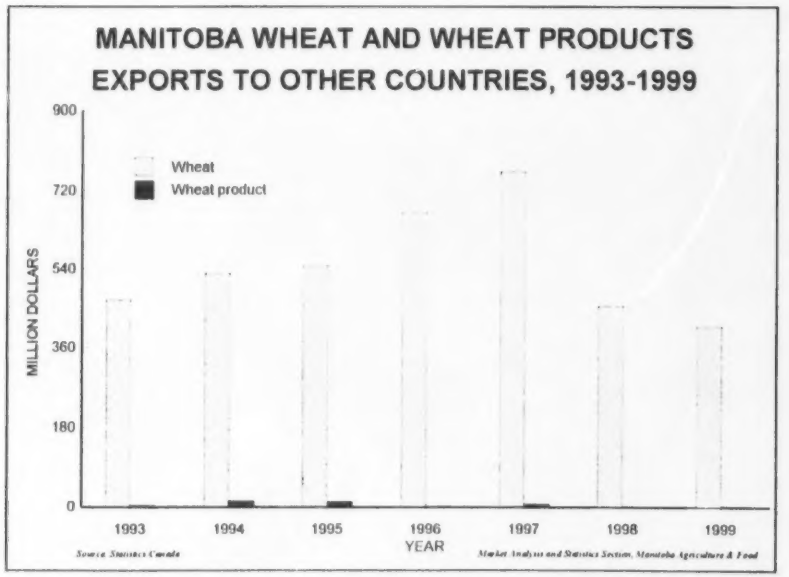

AREA OF WHEAT SEEDED
BY PROVINCE, 1999
ALBERTA 27.8%
ATL. PROVINCES 0.2%
B.C. 0.4%
MANITOBA 12.3%
ONTARIO 3.0%
QUEBEC 0.2%
SASKATCHEWAN 56.1%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

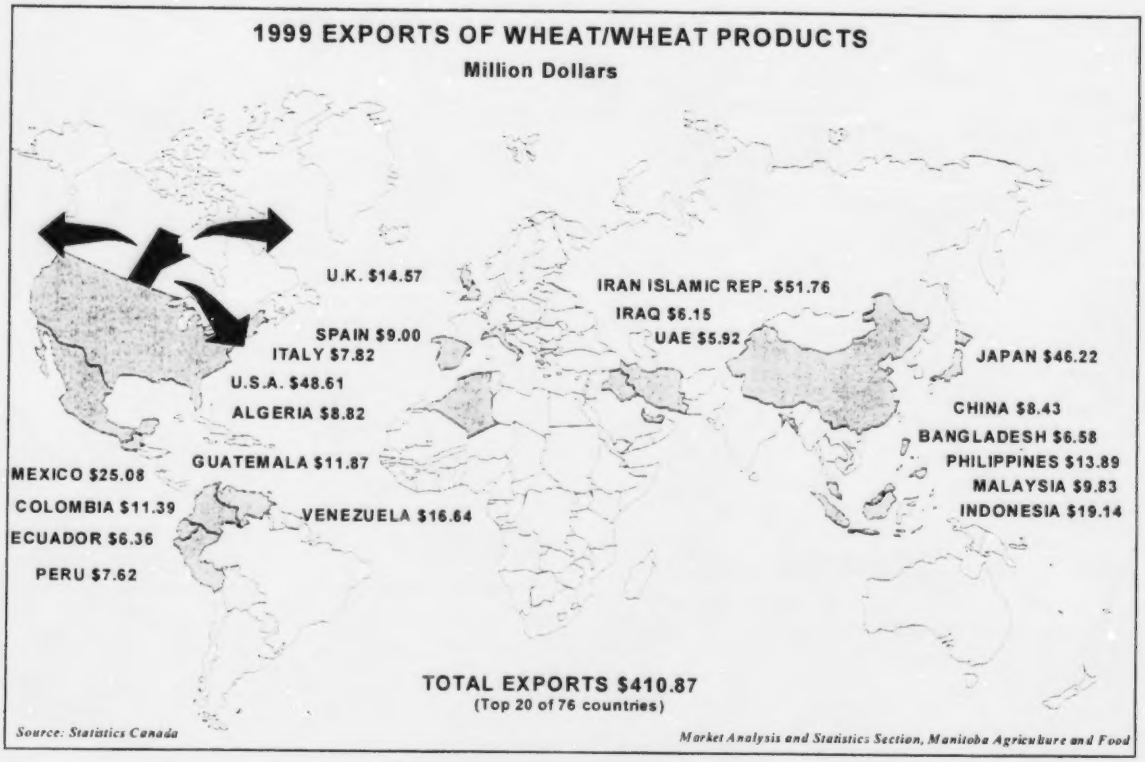

WHEAT PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981 - 1999
PERCENTAGE
25
20
15
10
5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture & Food

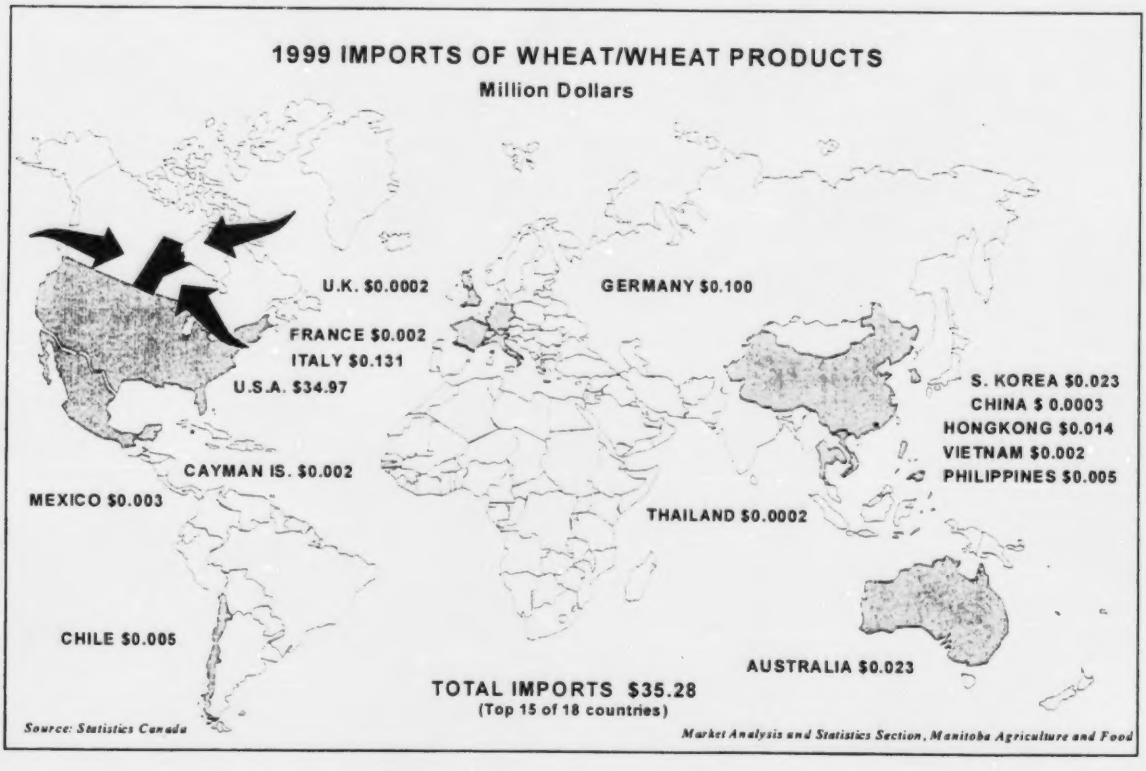

FARM VALUE OF WHEAT PRODUCTION
1971-1999
MILLION DOLLARS
900
720
540
360
180
0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR


FARM CASH RECEIPTS FROM WHEAT
BY PROVINCE, 1999
(MILLION DOLLARS)
ATL PROVINCES 0.1% 2.9
SASKATCHEWAN 50.2% 1595.6
MANITOBA 15.8% 502.8
B.C. 0.4% 13.1
ONTARIO 2.9% 92.7
QUEBEC 0.2% 7.4
ALBERTA 30.4% 965
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


WHEAT PRICES
1981 - 1999
AVERAGE FARM PRICE OF CROP
1CWRS (basis Wpg)
1CWAD (basis Wpg)
$ PER TONNE
300
250
200
150
100
50
80/81 81/82 82/83 83/84 84/85 85/86 86/87 87/88 88/89 89/90 90/91 91/92 92/93 93/94 94/95 95/96 96/97 97/98 98/99 99/00
CROP YEAR
Market Analysis and Statistics Section, Manitoba Agriculture & Food


MANITOBA WHEAT AND WHEAT PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993-1999
Wheat
Wheat product
MILLION DOLLARS
900
720
540
360
180
0
1993 1994 1995 1996 1997 1998 1999
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


1999 EXPORTS OF WHEAT/WHEAT PRODUCTS
Million Dollars
U.K. $14.57
SPAIN $9.00
ITALY $7.82
U.S.A. $48.61
ALGERIA $8.82
GUATEMALA $11.87
MEXICO $25.08
COLOMBIA $11.39
ECUADOR $6.36
PERU $7.62
VENEZUELA $16.64
IRAN ISLAMIC REP. $51.76
IRAQ $6.15
UAE $5.92
JAPAN $46.22
CHINA $8.43
BANGLADESH $6.58
PHILIPPINES $13.89
MALAYSIA $9.83
INDONESIA $19.14
TOTAL EXPORTS $410.87
(Top 20 of 76 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF WHEAT/WHEAT PRODUCTS
Million Dollars
U.K. $0.0002
FRANCE $0.002
ITALY $0.131
U.S.A. $34.97
CAYMAN IS. $0.002
MEXICO $0.003
CHILE $0.005
GERMANY $0.100
THAILAND $0.0002
AUSTRALIA $0.023
S. KOREA $0.023
CHINA $ 0.0003
HONGKONG $0.014
VIETNAM $0.002
PHILIPPINES $0.005
TOTAL IMPORTS $35.28
(Top 15 of 18 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

BARLEY SECTOR

BARLEY SECTOR PROFILE

Production:

The area seeded to barley in Manitoba peaked in 1981 at 2.4 million acres, of which 2.35 million acres were harvested. Barley production reached a record level of 116 million bushels in 1985, when the average yield was the second highest on record at 62.7 bushels per acre. The area planted to barley decreased in the late 1980s and 1990s to a 32-year low of 1.06 million acres in 1999. Excess soil moisture in the south-western area of the province in spring 1999 prevented seeding close to one million acres, some of which would have been barley. As a result, only one million acres of barley were harvested in Manitoba, a decrease of 19 percent from the 1998 level of 1.24 million harvested acres. Almost 56 million bushels were produced in 1999, a drop of 26 percent from the year before and 52 percent below the record 1985 level. Manitoba contributed 9.2 percent of total Canadian barley production in 1999, down from 13.7 percent in 1996.

Yields averaged 55.8 bushels per acre in 1999, 3.8 percent below the 10-year average of 58.0 bushels per acre and 7.6 percent below the 1998 yield of 60.4 bushels per acre. The largest average yield on record was 68.6 bushels per acre in 1992. Average barley prices, which ranged from $1.97 to $3.55 per bushel in the past five years, were record high in 1995. Prices for the 1999 crop rose by 1.5 percent to average $2.00 per bushel.

The total value of the Manitoba barley crop was highest in 1981, at $277.3 million, but dropped to a 22-year low of $99.3 million in 1993. Higher prices increased the value of the crop in 1994 and 1995. The decrease in production in 1999 lowered the value of the barley crop by almost 25 percent to $111.4 million.

Estimated total farm expenses for barley production rose from $149.43 per acre in 1994 to $161.79 per acre in 1996, were lower in 1997 and 1998, but increased to $166.30 per acre in 1999. Total expenses included operating, labour and fixed costs.

Marketing:

Annual cash receipts from barley marketings fluctuated over the past six years, increasing from $57.8 million in 1994 to $94.9 million in 1996, but declining to $86.9 million in 1997, $52.1 million in 1998 and $38.4 million in 1999. Down from earlier years, Manitoba's contribution to Canadian barley receipts fell from 13.2 percent in 1993 to 8.3 percent in 1995, increased to 10.2 percent in 1997 and 9.2 percent in 1998, but declined again to 7.6 percent in 1999.

Most of the 1999 crop was feed quality and fed on farm or marketed "off-Board". Malting barley selections declined in 1997, 1998 and 1999. Manitoba Designated barley comprised 80 percent of the barley marketed to the Canadian Wheat Board in 1999/2000, down from 82 percent a year earlier, and about 21-22 percent of all barley marketed in 1998 and 1999.

Barley marketings decreased from 39.8 million bushels in 1996/97 to 18.7 million bushels in 1999/2000. Over the same period, carryover fell from 13.8 million bushels to 8.3 million bushels. In 1999, about 23.5 percent of the barley crop was planted to higher-yielding feed varieties, with about 8.4 percent to hulless types (2- and 6-Row), about 55 percent to 6-Row malting types and 13 percent to 2-Row barley. The 6-Row blue aleurone types are mainly for the domestic and U.S. markets. The portion sown to hulless barley,

which has superior, lower fibre, feed qualities has increased over the past few years. Manitoba farmers deliver some feed barley to Saskatchewan and grain and feed companies import barley from Saskatchewan into Manitoba.

Processing:

About three-quarters of the barley marketed in Manitoba in 1999 was used for domestic animal feed, mainly for hogs. About 4.6 percent of Manitoba's 1999 barley crop was selected for use by either the domestic or foreign food and beverage industries. Some of the selected or designated barley is processed into food, such as pot or pearl barley, the remainder being used for malt. Manitoba has one major maltster, Dominion Malting Ltd. Malt is either used by the province's breweries, such as Molson Breweries and Fort Garry Brewing Co. Ltd., or exported.

Trade:

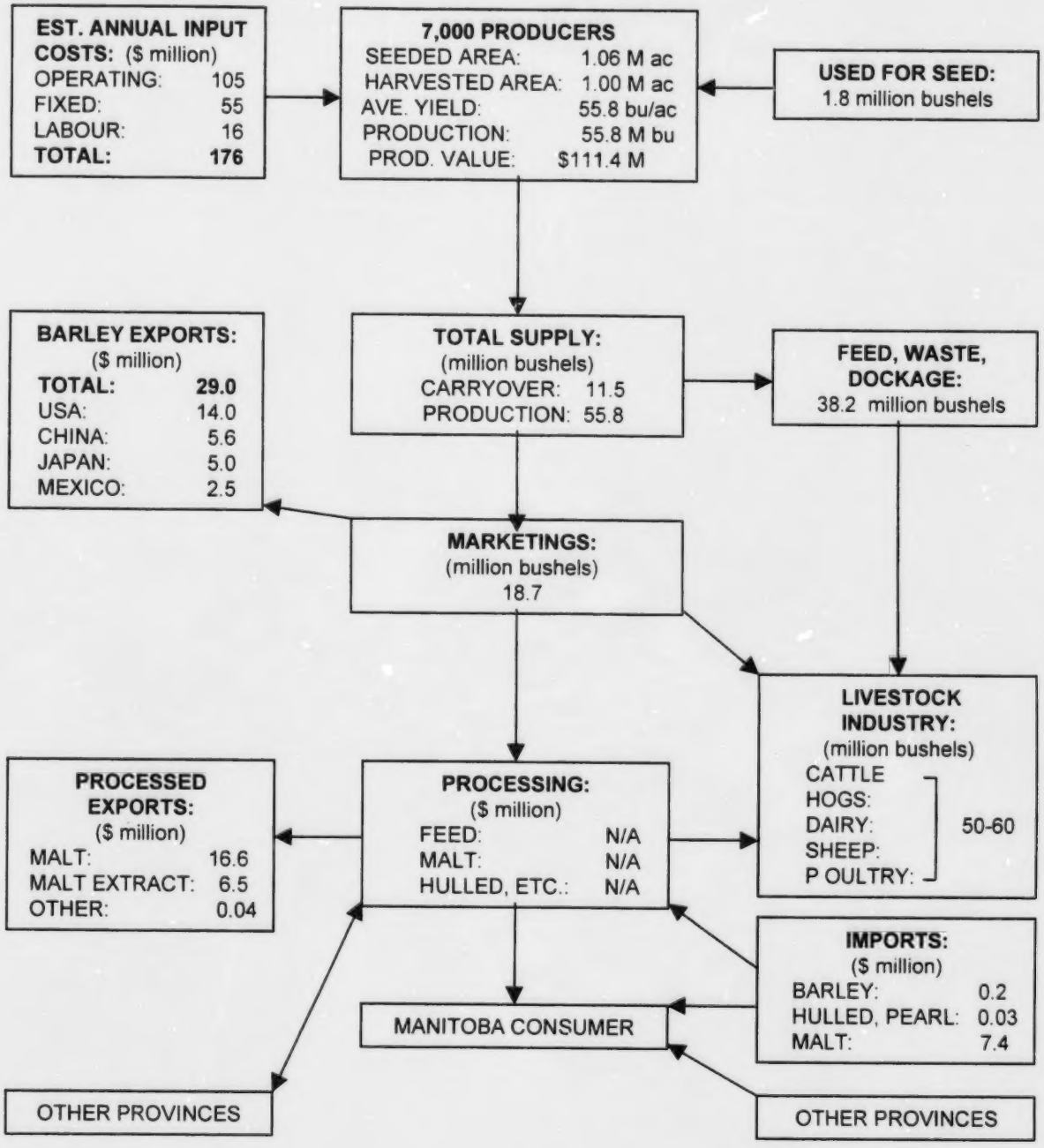
Manitoba barley exports to other countries, mainly malting barley and sold mostly in the unprocessed form, increased from $64.5 million in 1996 to $73.7 million in 1997, but dropped to $29.0 million in 1999. Over 93 percent of the province's barley exports were shipped to the United States, China, Japan and Mexico in 1999 with smaller amounts going to 9 other countries. About $16.6 million of Manitoba-produced malt and $6.5 million of malt extract were exported in 1999.

Only $7.7 million of barley and malt were imported into Manitoba in 1999.

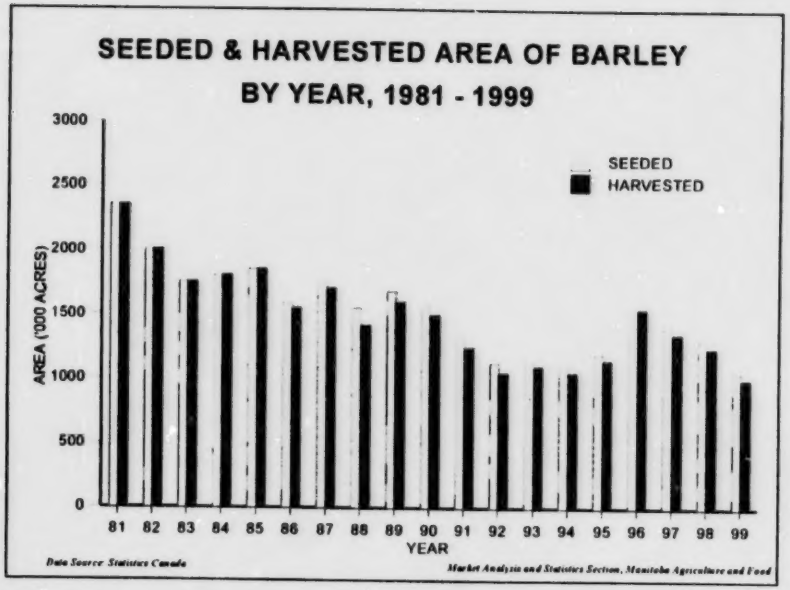
BARLEY AND BARLEY PRODUCTS SECTOR

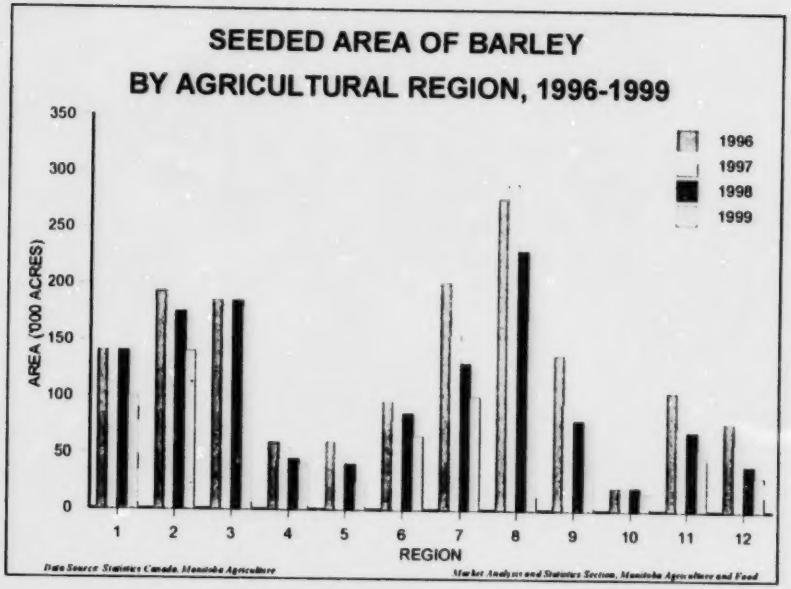
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	9,067	8,500	8,000	7,000	88
CROP PRODUCTION:					
Seeded Area('000 acres):	1,550	1,400	1,300	1,060	82
% of Canada	12.0	11.3	11.4	9.7	
Harvested Area ('000 acres):	1,550	1,350	1,240	1,000	81
Yield/acre (bushels)	62.6	57.3	60.4	55.8	92
Production (million bu):	97.0	77.4	74.9	55.8	74
% of Canada	13.7	12.3	12.8	9.2	
Average Price ($/bu):	2.57	2.25	1.97	2.00	102
VALUE OF PRODUCTION ($ million):	249.2	173.9	147.6	111.4	75
EST. TOTAL EXPENSES ($/acre):	161.79	158.62	160.99	166.30	103
CASH RECEIPTS ($ million):	94.9	86.9	52.1	38.4	74
% of Canada	8.7	10.2	9.1	7.6	
PLANTING DISTRIBUTION (%):	**96/97**	**97/98**	**98/99**	**99/2000**	
High-yield Feed	N/A	N/A	N/A	23.5	
Hulless (2- and 6-Row)	N/A	7.0	7.5	8.4	112
6-Row malting types	N/A	N/A	N/A	55.0	
2-Row	N/A	N/A	N/A	13.0	
CROP DISPOSITION (million bu):	103.4	91.2	86.4	67.3	78
Marketings: - All Barley	39.8	26.5	20.6	18.7	91
- Feed Barley	28.3		16.2	14.7	91
- Designated Barley	11.5		4.4	4.0	91
Seed Requirements	2.4	2.2	1.8	2.1	117
Feed, Waste & Dockage	47.4	51.0	52.5	38.2	73
Carryover, July 31	13.8	11.5	11.5	8.3	72
EXPORTS ($ million):	88.7	96.5	54.2	52.2	96
Unprocessed	64.5	73.7	33.4	29.0	87
Processed	24.2	22.8	20.8	23.2	112
IMPORTS ($ million):	1.4	3.3	8.9	7.7	87
Unprocessed	0.5	0.2	0.8	0.2	25
Processed	1.0	3.1	8.1	7.5	93

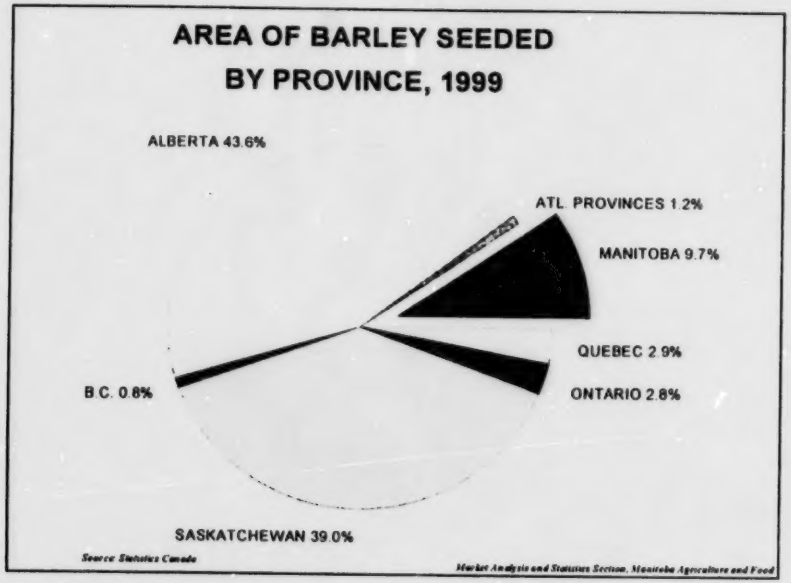
BARLEY INDUSTRY CHART, 1999

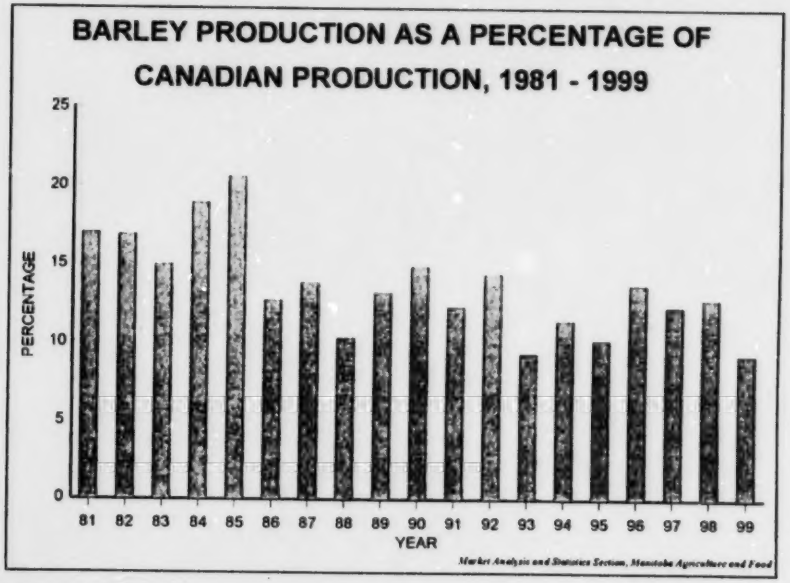


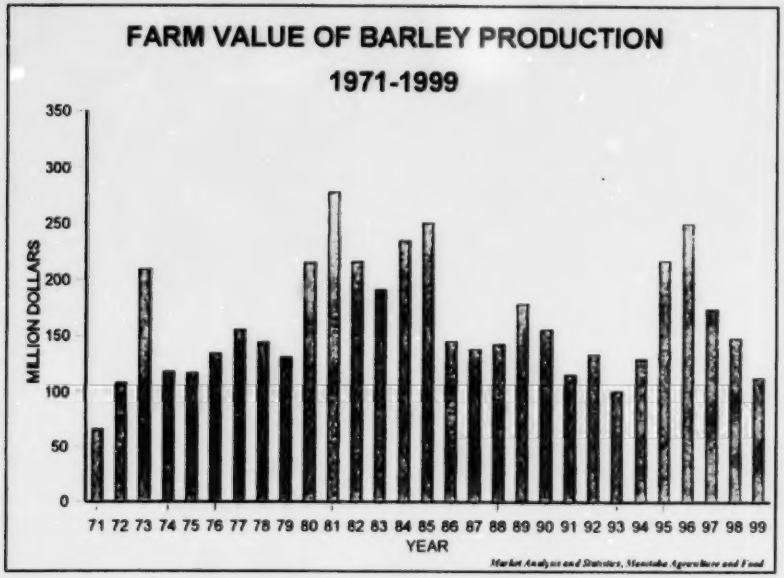
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

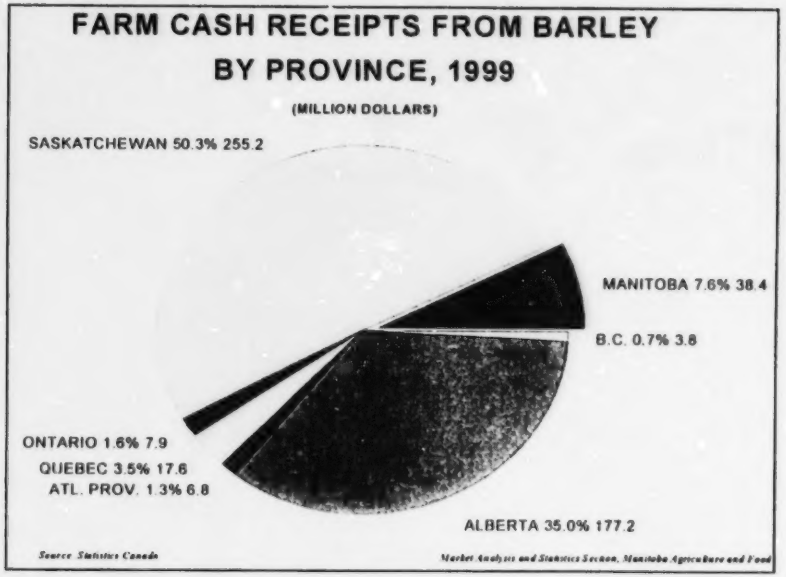

SEEDED & HARVESTED AREA OF BARLEY
BY YEAR, 1981 - 1999
AREA ('000 ACRES)
3000
2500
2000
1500
1000
500
0
SEEDED
HARVESTED
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

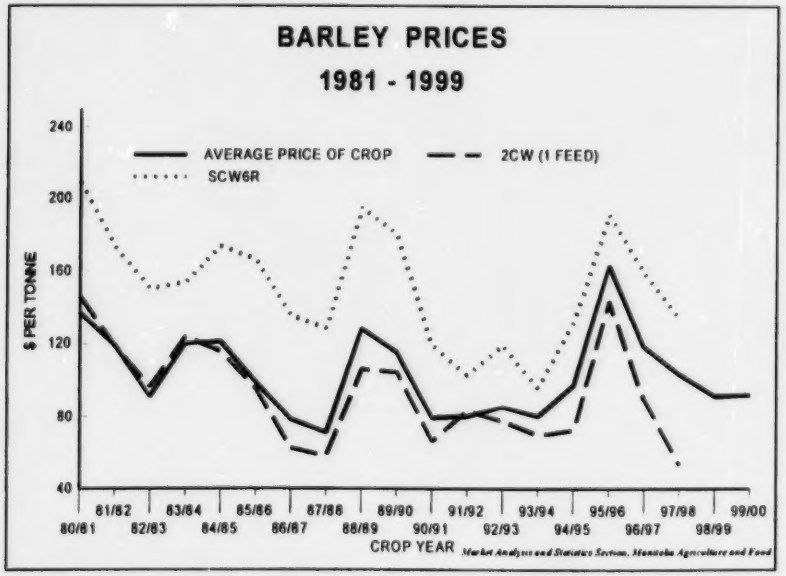

SEEDED AREA OF BARLEY
BY AGRICULTURAL REGION, 1996-1999
AREA ('000 ACRES)
350
300
250
200
150
100
50
0
1996
1997
1998
1999
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

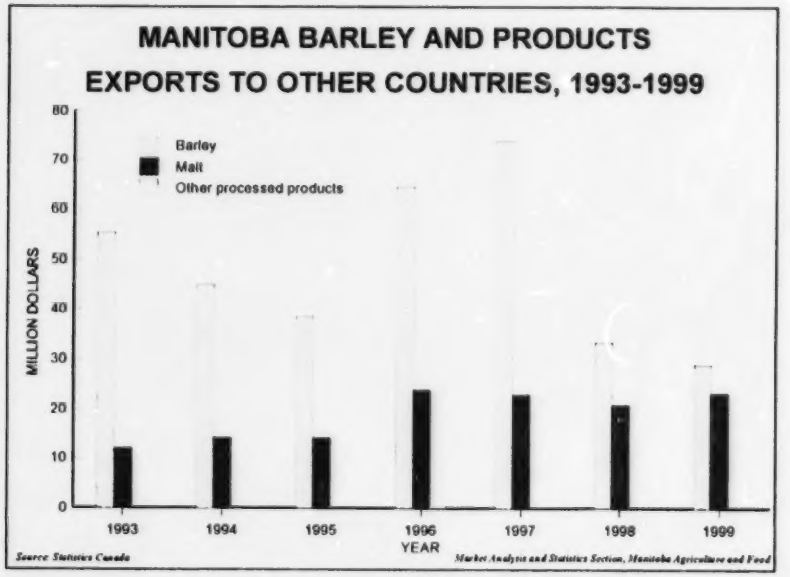

AREA OF BARLEY SEEDED
BY PROVINCE, 1999
ALBERTA 43.6%
ATL. PROVINCES 1.2%
MANITOBA 9.7%
QUEBEC 2.9%
ONTARIO 2.8%
B.C. 0.8%
SASKATCHEWAN 39.0%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

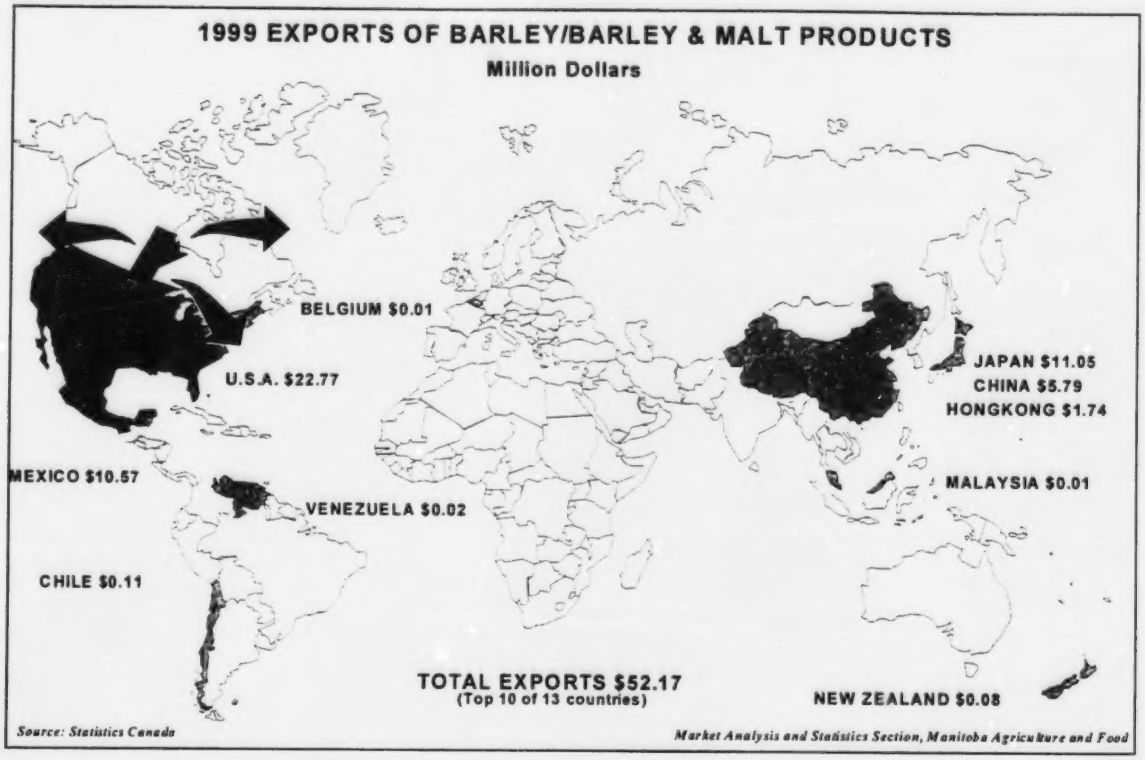

BARLEY PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981 - 1999
PERCENTAGE
25
20
15
10
5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

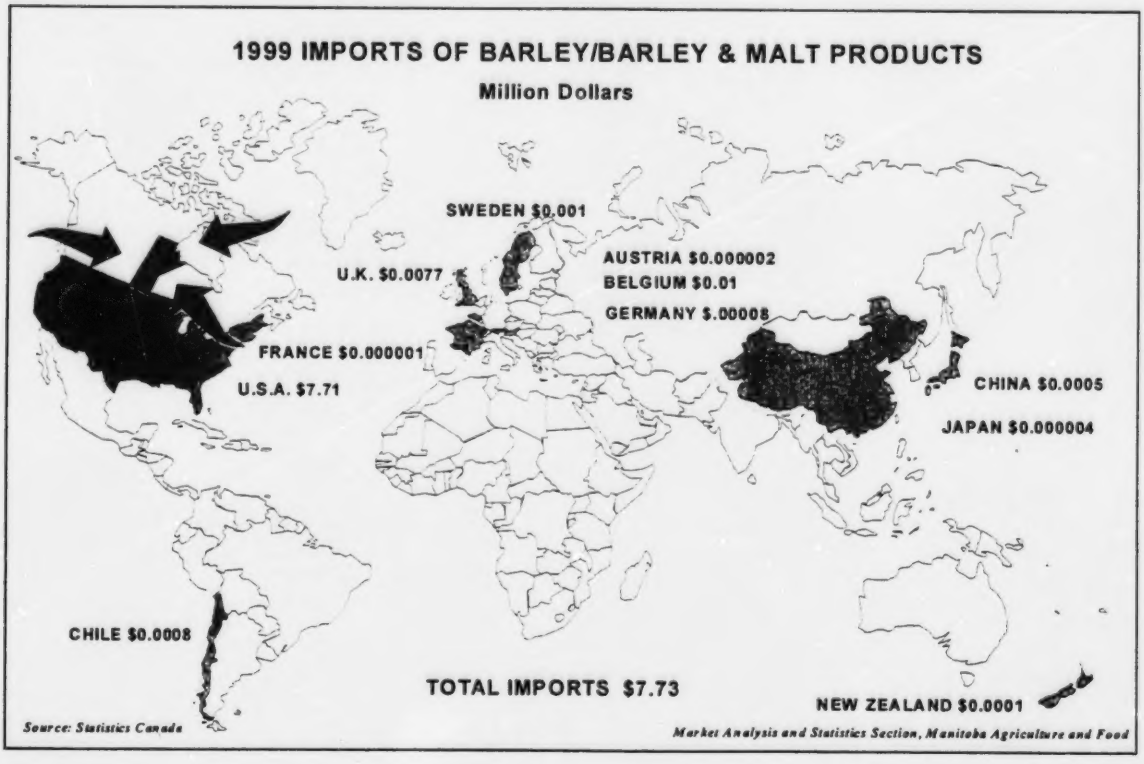

FARM VALUE OF BARLEY PRODUCTION
1971-1999
MILLION DOLLARS
350
300
250
200
150
100
50
0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics, Manitoba Agriculture and Food


FARM CASH RECEIPTS FROM BARLEY
BY PROVINCE, 1999
(MILLION DOLLARS)
SASKATCHEWAN 50.3% 255.2
MANITOBA 7.6% 38.4
B.C. 0.7% 3.8
ONTARIO 1.6% 7.9
QUEBEC 3.5% 17.6
ATL. PROV. 1.3% 6.8
ALBERTA 35.0% 177.2
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


BARLEY PRICES
1981 - 1999
AVERAGE PRICE OF CROP
2CW (1 FEED)
SCW6R
$ PER TONNE
240
200
160
120
80
40
80/81 81/82 82/83 83/84 84/85 85/86 86/87 87/88 88/89 89/90 90/91 91/92 92/93 93/94 94/95 95/96 96/97 97/98 98/99 99/00
CROP YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MANITOBA BARLEY AND PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993-1999
Barley
Malt
Other processed products
MILLION DOLLARS
80
70
60
50
40
30
20
10
0
1993 1994 1995 1996 1997 1998 1999
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 EXPORTS OF BARLEY/BARLEY & MALT PRODUCTS
Million Dollars
BELGIUM $0.01
U.S.A. $22.77
MEXICO $10.57
VENEZUELA $0.02
CHILE $0.11
JAPAN $11.05
CHINA $5.79
HONGKONG $1.74
MALAYSIA $0.01
NEW ZEALAND $0.08
TOTAL EXPORTS $52.17
(Top 10 of 13 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF BARLEY/BARLEY & MALT PRODUCTS
Million Dollars
SWEDEN $0.001
AUSTRIA $0.000002
U.K. $0.0077
BELGIUM $0.01
GERMANY $.00008
FRANCE $0.000001
U.S.A. $7.71
CHINA $0.0005
JAPAN $0.000004
CHILE $0.0008
TOTAL IMPORTS $7.73
NEW ZEALAND $0.0001
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

OAT SECTOR

OAT SECTOR PROFILE

Production:

The area of oats seeded and harvested in Manitoba was greatest in 1921 at 2.2 million acres. As the agricultural industry began to rely more on machinery and less on horses, the area of oats needed for animal feed declined over time. By 1991, only 384,000 acres were planted to oats, of which 270,000 acres were harvested for grain with the remainder being used for hay or silage. The popularity of oats for human consumption increased in the 1990s. In 1999, 810,000 acres of oats were seeded with 730,000 acres harvested for grain, down from 1,000,000 acres seeded and 900,000 acres harvested in 1998. From a peak production of 74.4 million bushels in 1922, oat production declined to 14.4 million bushels in 1991. The 1999 production of 55.4 million bushels was down by 17 percent from 1998. Manitoba contributed 23.5 percent of total Canadian oat production in 1999, down from 26.0 percent in 1998.

The average yield of 75.9 bushels per acre in 1999 was a new record, compared to 74.2 bushels per acre in 1998 and a 10-year average of 67.2 bushels per acre. The previous record yield was 75.0 bushels per acre in 1992.

Average oat prices, which ranged from $1.50 to $2.25 per bushel in the past seven years, declined to $1.31 per bushel for the 1999 crop. Prices were record high in 1988 at $2.33 per bushel. The 1998 crop averaged $1.62 per bushel, a decrease of 16.1 percent from 1997.

The total value of the Manitoba oat crop reached a record of $144.7 million in 1996, but the value was $72.6 million in 1999. A 30-year low of $18.7 million occurred in 1991.

Estimated farm expenses for oat production, including operating, labour and fixed costs, rose from $136.87 per acre in 1995 to $145.16 in 1996, but were $142.46 per acre in 1999.

Marketing:

Annual cash receipts from the sector increased from $18.5 million in 1992 to a record $85.1 million in 1996. Farm cash receipts in 1998 and 1999 declined to $64.2 million and $64.7 million respectively. Manitoba's contribution to Canadian oat receipts rose from 18.9 percent in 1992 to 36.4 percent in 1999.

About 68 percent of oats produced in 1999 were Tan or high protein milling oats, 22 percent were White or pony/performance oats and 10 percent were other/general purpose oats.

Oat marketings increased from 17.1 million bushels in 1992/93 to 46.4 million bushels in 1996/97, fell to 43.2 million bushels in 1998/99, but rose to 45.6 million bushels in 1999/2000. Oat carryover increased from 4.5 million bushels in 1997/98 to 9.7 million bushels at the end of the 1998/99 crop year, but declined to 6.5 million bushels on July 31, 2000.

Processing:

Oats are processed by Can-Oat Milling Products, Inc., in Portage la Prairie, into flour, rolled oats, groats and oat bran. Emerson Milling processes oats into high-quality horse feed.

Trade:

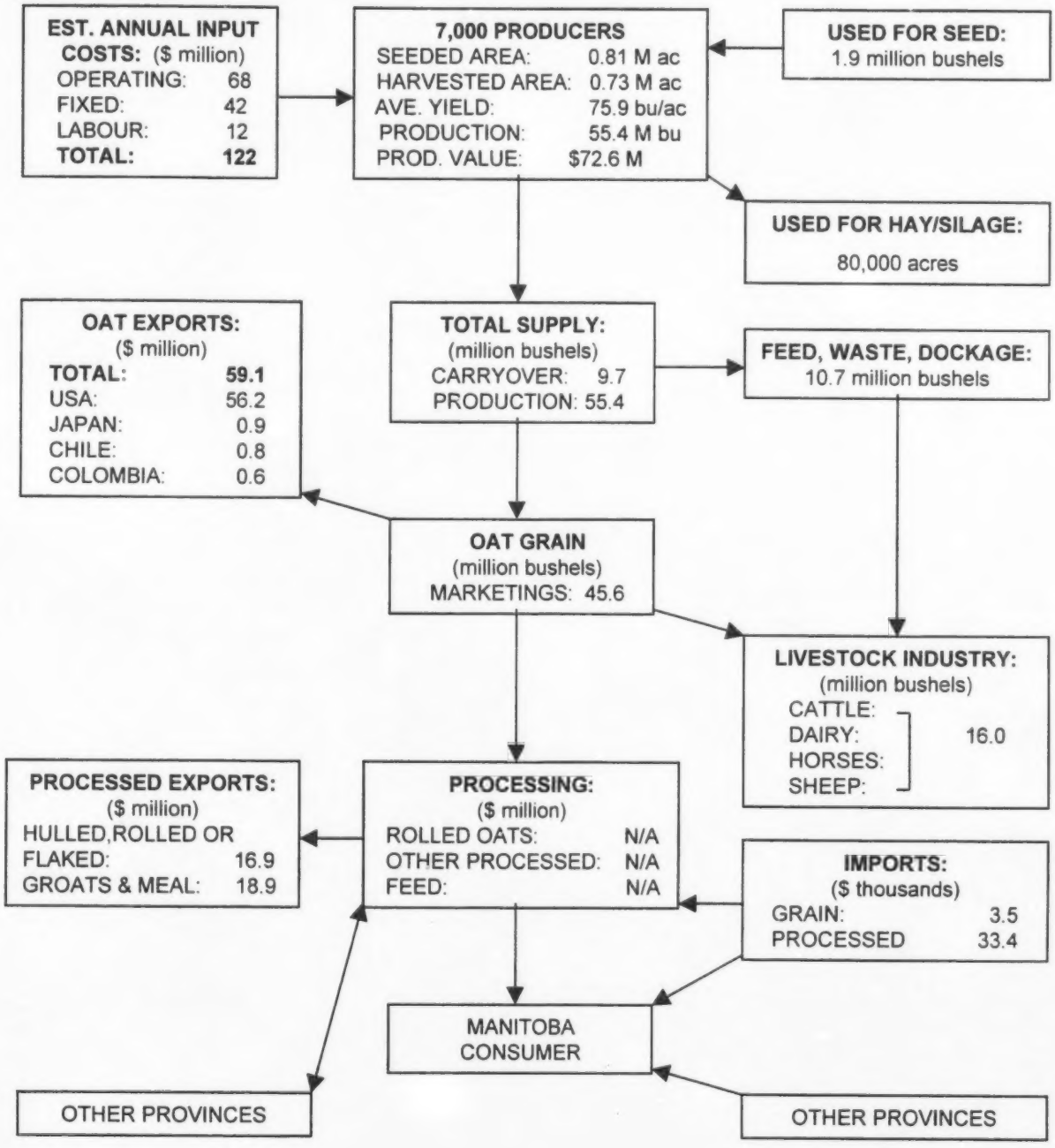
Unprocessed oat exports to other countries decreased in value from $89.5 million in 1997 to $59.1 million in 1999. Manitoba oats have been increasingly popular for racehorses since the 1980s and more recently for milling and cereal products in the United States. Over 88 percent of the province's oat exports were shipped to the U.S.A. in 1999 with smaller amounts going to Japan, Colombia, Chile and 14 other countries. Oat flour, rolled oats and oat bran exports totalled $35.8 million in 1999, most of which were sold to the U.S.A.

Imports of oats and processed oat products were valued at $36,900 in 1999, half the 1998 level and a significant decrease from $506,700 in 1996.

OATS AND OAT PRODUCTS SECTOR

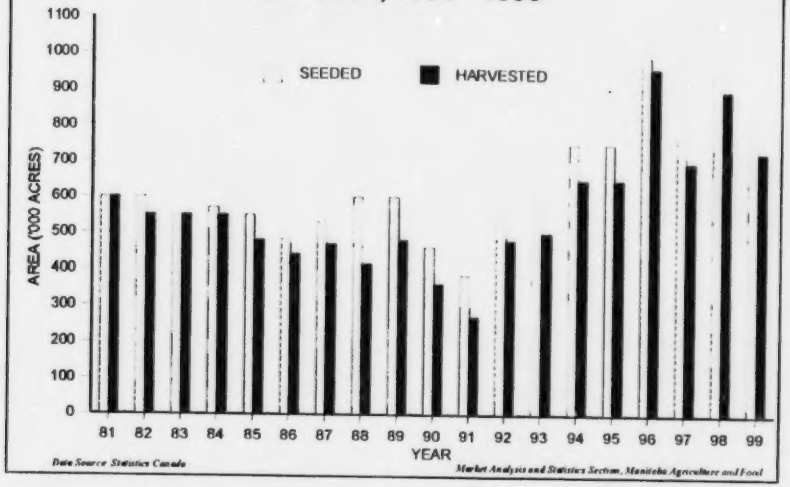
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	8,680	7,000	8,000	7,000	88
CROP PRODUCTION:					
Seeded Area ('000 acres):	1,050	800	1,000	810	81
% of Canada	20.6	17.3	19.6	17.4	
Harvested Area ('000 acres):	960	700	900	730	81
Yield/acre (bushels):	71.4	68.1	74.2	75.9	102
Production (million bu):	68.5	47.7	66.8	55.4	83
% of Canada	24.2	21.1	26.0	23.5	
Average Price ($/bu):	2.11	1.93	1.62	1.31	81
VALUE OF PRODUCTION ($ million):	144.7	92.0	108.2	72.6	67
ESTIMATED TOTAL EXPENSES ($/acre):	145.16	140.51	141.87	142.46	100
CASH RECEIPTS ($ million):	85.1	79.7	64.2	64.7	101
% of Canada	27.9	29.4	32.0	36.4	
ESTIMATED DISTRIBUTION OF OAT PRODUCTION BY TYPE (%):					
TAN (high protein milling oats)	80	70	65	68	105
WHITE (pony or performance oats)	17	20	21	22	105
OTHER (general purpose)	2	10	15	10	67
CROP DISPOSITION (million bu):	70.8	53.5	71.3	65.1	91
Marketings	46.4	31.3	43.2	45.6	106
Seed Requirements	1.9	2.3	1.9	2.3	121
Feed, Waste & Dockage	16.7	15.4	16.5	10.7	65
Carryover, July 31	5.8	4.5	9.7	6.5	67
EXPORTS ($ million):	101.2	116.0	93.5	94.9	101
Unprocessed	79.0	89.5	64.1	59.1	92
Processed	22.2	26.5	29.4	35.8	122
IMPORTS ($ thousand):	506.7	103.0	73.4	36.9	50
Unprocessed	489.8	21.0	65.4	3.5	5
Processed	16.9	82.0	8.0	33.4	418

OAT INDUSTRY CHART, 1999



DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

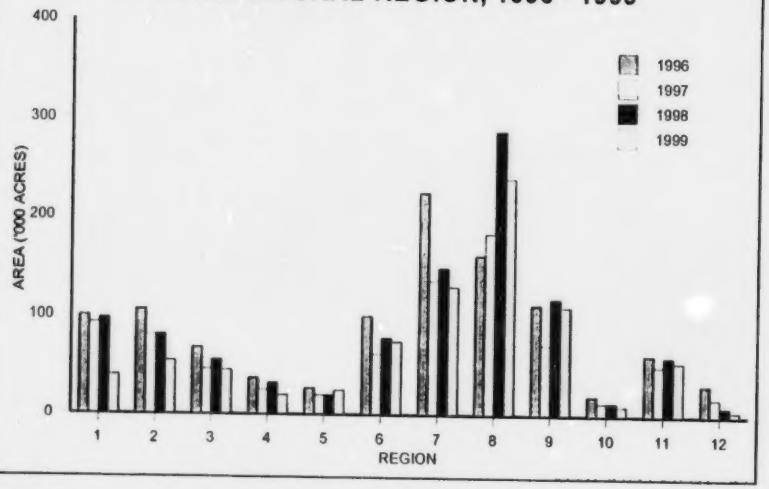
SEEDED & HARVESTED AREA OF OATS BY YEAR, 1981 - 1999



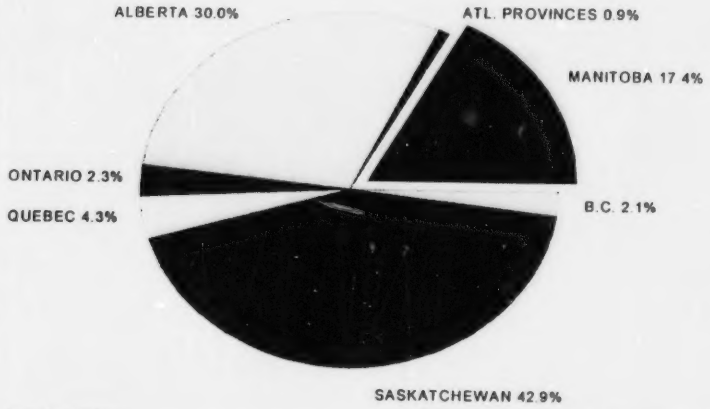
Data Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

SEEDED AREA OF OATS BY AGRICULTURAL REGION, 1996 - 1999



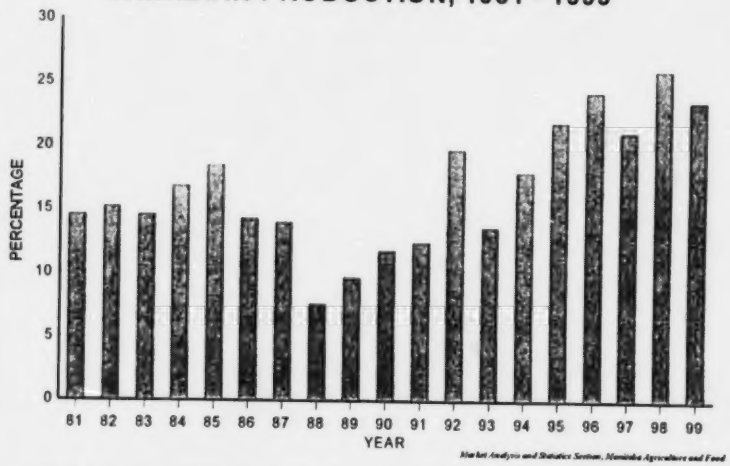
AREA OF OATS SEEDED BY PROVINCE, 1999



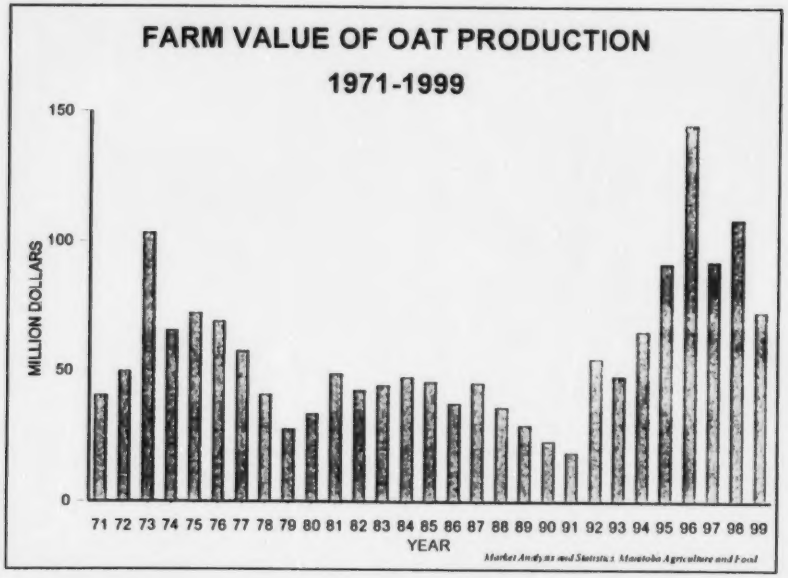
Source: Statistics Canada

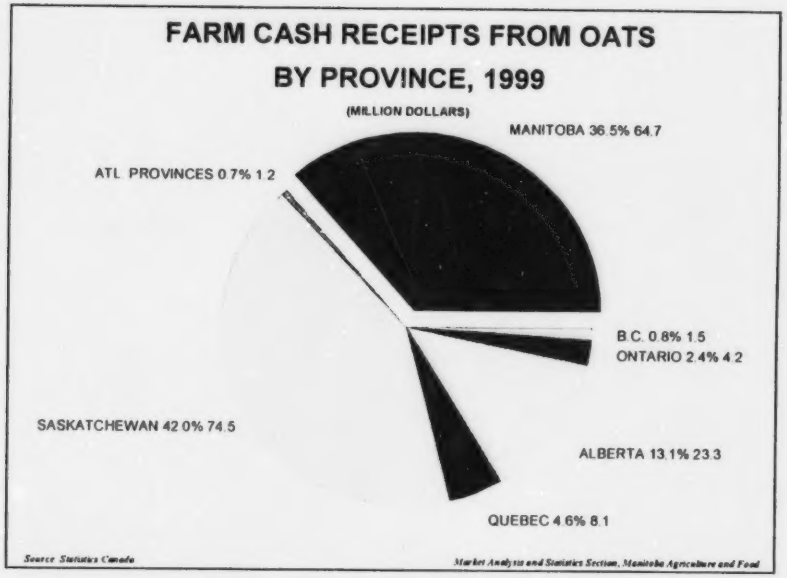
Market Analysis and Statistics Section, Manitoba Agriculture and Food

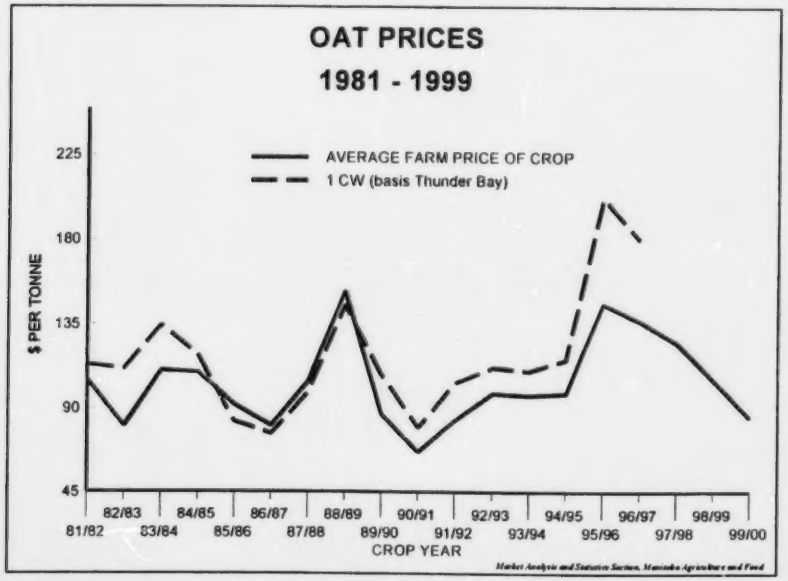
OATS PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981 - 1999

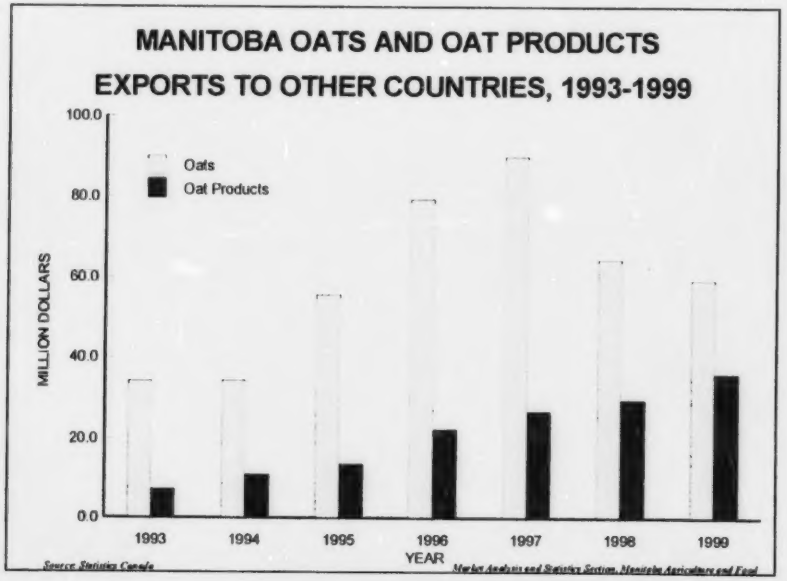


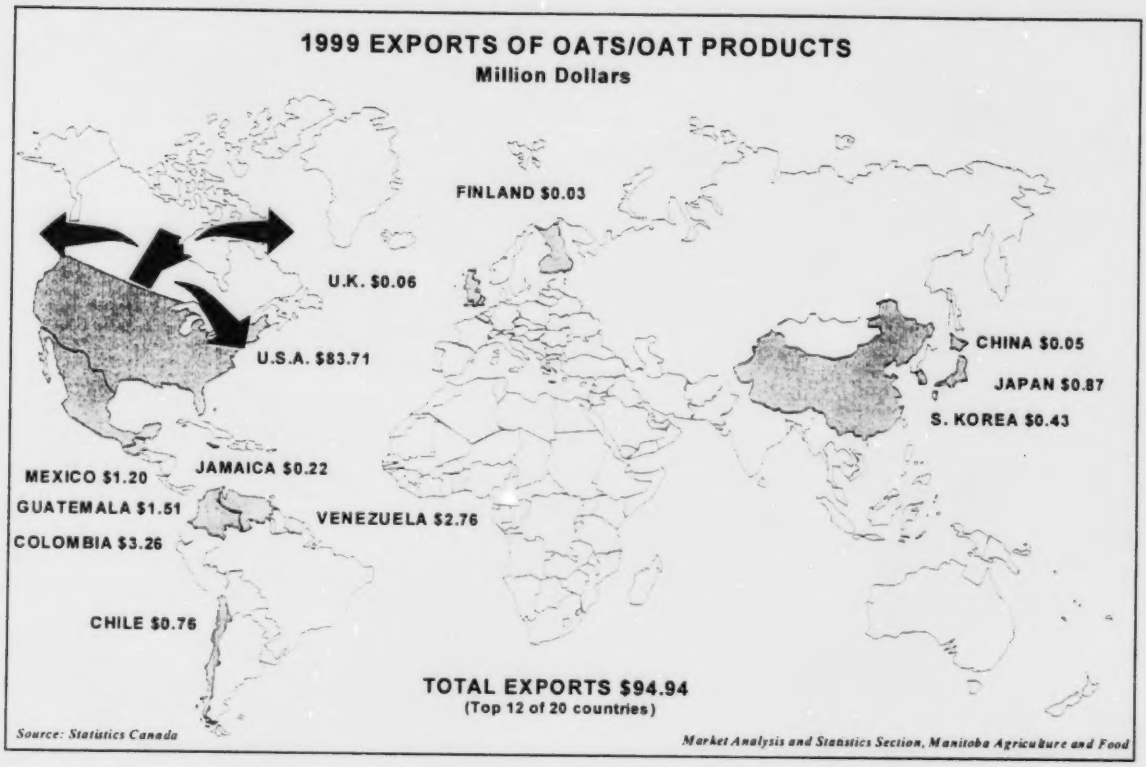
Market Analysis and Statistics Section, Manitoba Agriculture and Food

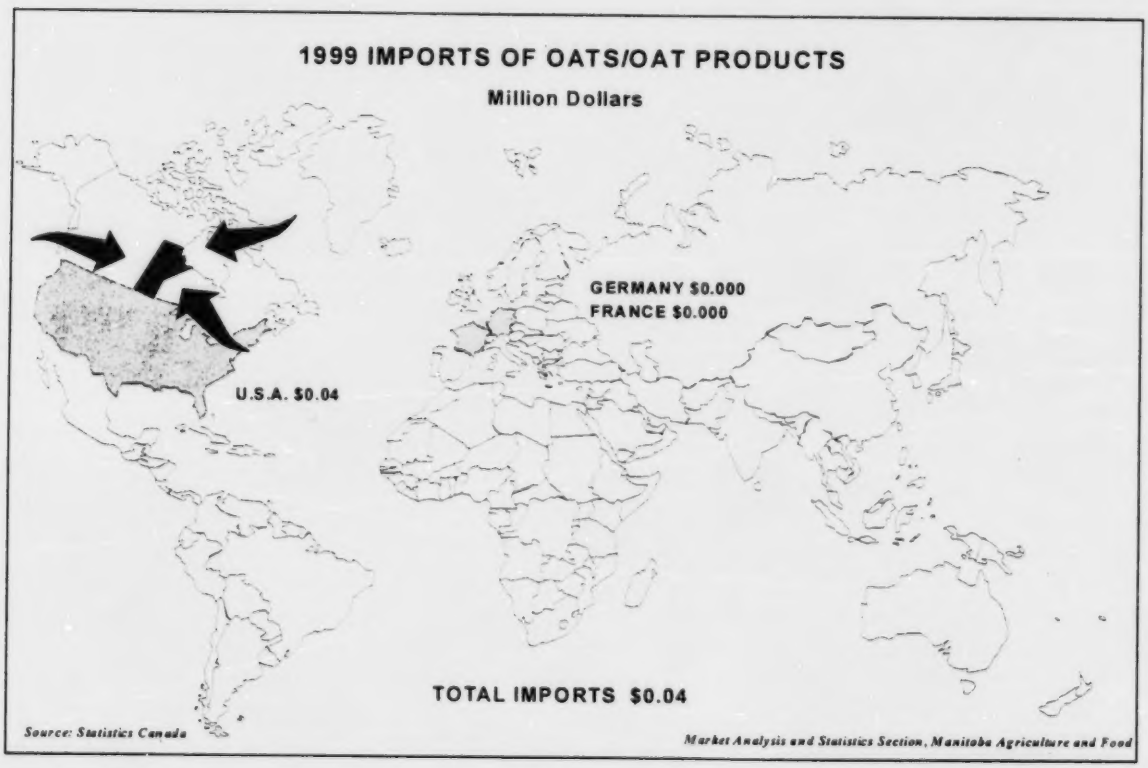

FARM VALUE OF OAT PRODUCTION
1971-1999
MILLION DOLLARS
150
100
50
0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics, Manitoba Agriculture and Food


FARM CASH RECEIPTS FROM OATS
BY PROVINCE, 1999
(MILLION DOLLARS)
MANITOBA 36.5% 64.7
ATL. PROVINCES 0.7% 1.2
B.C. 0.8% 1.5
ONTARIO 2.4% 4.2
SASKATCHEWAN 42.0% 74.5
ALBERTA 13.1% 23.3
QUEBEC 4.6% 8.1
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

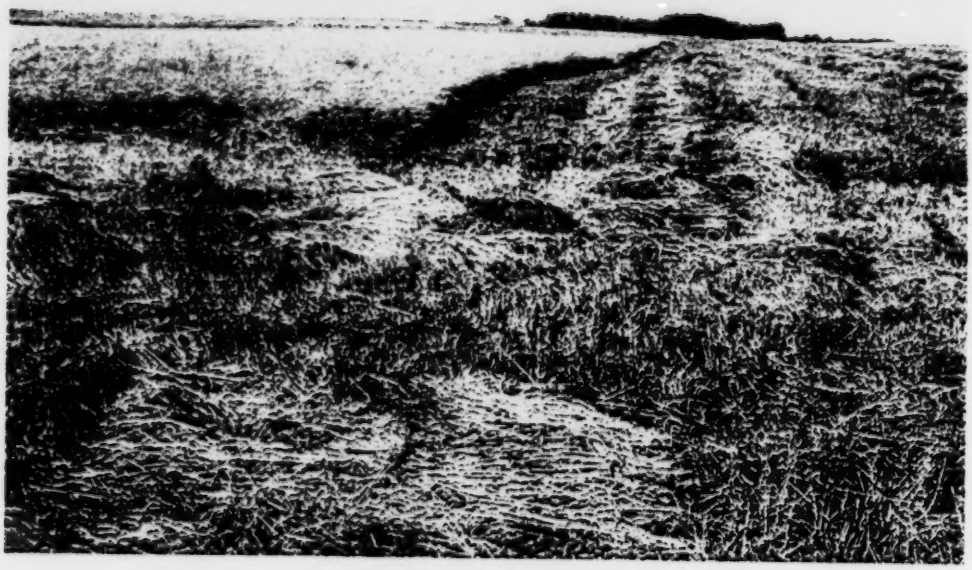

OAT PRICES
1981 - 1999
AVERAGE FARM PRICE OF CROP
1 CW (basis Thunder Bay)
$ PER TONNE
225
180
135
90
45
81/82 82/83 83/84 84/85 85/86 86/87 87/88 88/89 89/90 90/91 91/92 92/93 93/94 94/95 95/96 96/97 97/98 98/99 99/00
CROP YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MANITOBA OATS AND OAT PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993-1999
Oats
Oat Products
MILLION DOLLARS
100.0
80.0
60.0
40.0
20.0
0.0
1993 1994 1995 1996 1997 1998 1999
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 EXPORTS OF OATS/OAT PRODUCTS
Million Dollars
FINLAND $0.03
U.K. $0.06
U.S.A. $83.71
CHINA $0.05
JAPAN $0.87
S. KOREA $0.43
MEXICO $1.20
JAMAICA $0.22
GUATEMALA $1.51
VENEZUELA $2.76
COLOMBIA $3.26
CHILE $0.76
TOTAL EXPORTS $94.94
(Top 12 of 20 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF OATS/OAT PRODUCTS
Million Dollars
GERMANY $0.000
FRANCE $0.000
U.S.A. $0.04
TOTAL IMPORTS $0.04
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

RYE SECTOR



RYE SECTOR PROFILE

Production:

Manitoba producers have been growing rye since the early 1900s. The area of rye seeded and harvested has varied over the years, reaching a record 230,000 acres in 1982 and 1989. Low prices relative to alternative crops in 1990 led to declining areas planted to rye in the early 1990s and, by 1994, only 40,000 acres were seeded. Prices improved and the area increased to120,000 acres in 1998, but declined to 80,000 acres in 1999, partly due to excess soil moisture in the south-west, which hampered seeding. From a peak production of 8.4 million bushels in 1982, rye production declined to 1.5 million bushels in 1994. The 1999 production of 3.0 million bushels was down by 29 percent from the previous year. Manitoba produced 26.8 percent of the Canadian rye crop in 1998, but only 19.7 percent in 1999.

The average yield in 1999 was a record 37.5 bushels per acre, well above the10-year average of 33.4 bushels per acre. The previous record yield was 36.5 bushels per acre in 1982. Average rye prices ranged from $2.00 per bushel for the 1992 crop to $4.34 per bushel for the 1980 crop. The price declined from $3.90 per bushel in 1997 to $1.71 per bushel in 1999, partly due to less of the crop being used for milling and more for feed.

The total value of the Manitoba rye crop was highest in 1981, at $25.9 million, but dropped to an eight-year low of $3.7 million in 1993. Lower production combined with lower prices, decreasing the value of rye production by 48 percent from $9.8 million in 1998 to $5.1 million in 1999.

Estimated farm expenses for rye production, including operating, labour and fixed costs, rose from $129.03 per acre in 1992 to $148.80 per acre in 1999.

Marketing:

Annual cash receipts from the sector increased from $2.9 million in 1993 to $10.1 million in 1996, but declined to $5.2 million in 1999. Manitoba's contribution to Canadian rye receipts rose from 14.0 percent in 1993 to 29.7 percent in 1999.

Rye is used for baking and flavouring as well as for livestock feed. Previous years' harvest surveys conducted by the Canadian Grain Commission show fairly high protein levels for the rye crop.

Rye marketings increased from 1.24 million bushels in 1993/94 to 2.94 million bushels in 1998/99, but declined to 2.72 million bushels in 1999/2000. Rye carryover fell from 1.18 million bushels on July 31, 1999 to 0.79 million bushels a year later.

Processing:

Most Manitoba bakeries produce rye bread. Small quantities of rye malt are used to flavour the rye whiskey produced in Manitoba.

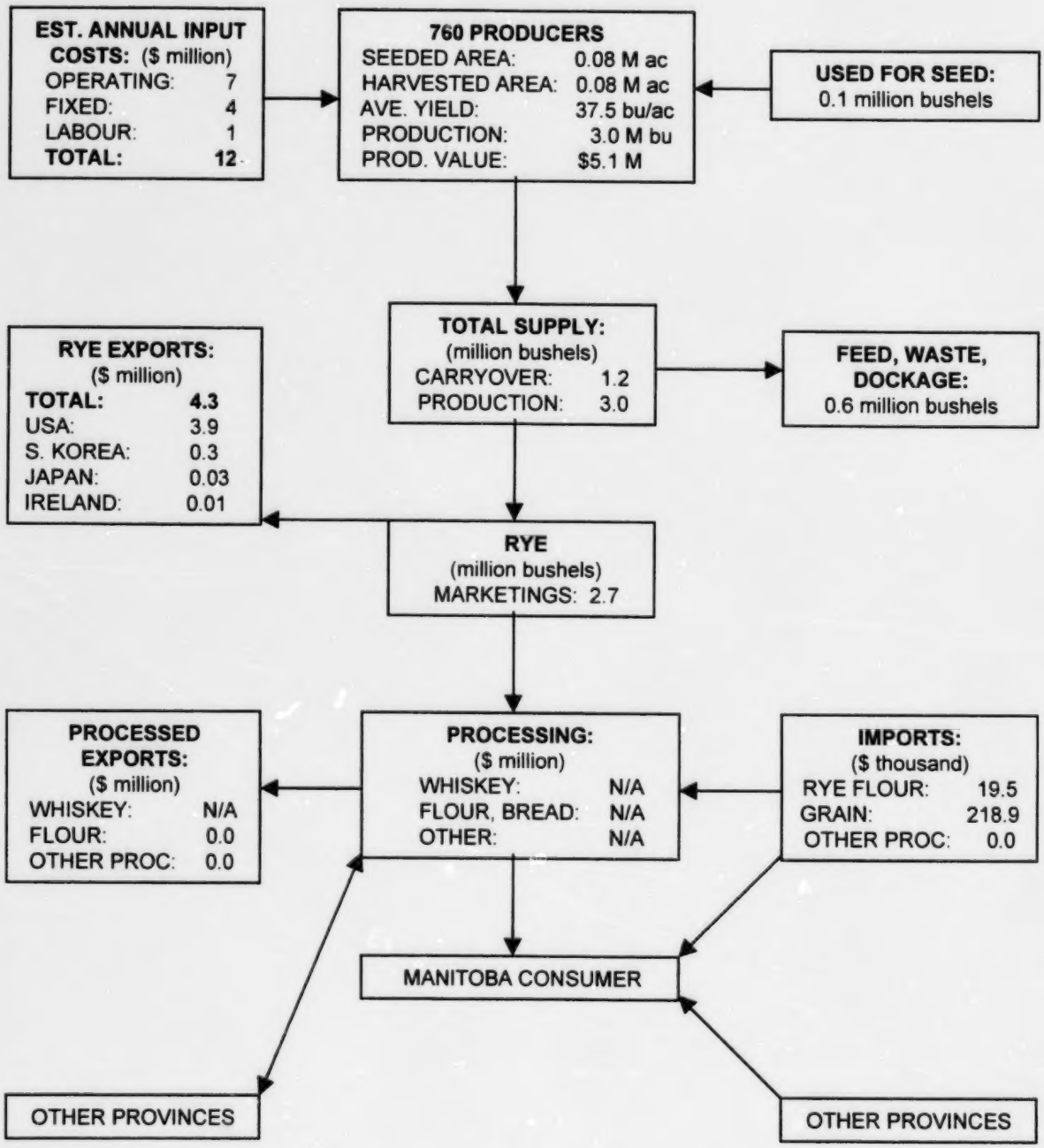
Trade:

Unprocessed rye exports to other countries decreased in value to $4.3 million in 1999 from $5.4 million in 1998. The United States was the primary market for Manitoba product in 1999 with small amounts going to Japan, Ireland and South Korea and five other countries. Minimal amounts of rye flour, valued at $12,500, were exported to Belgium in 1996, but none was exported in the next three years. Imports of unprocessed rye and rye flour from the United States were valued at $218,900 and $19,500 respectively in 1999.

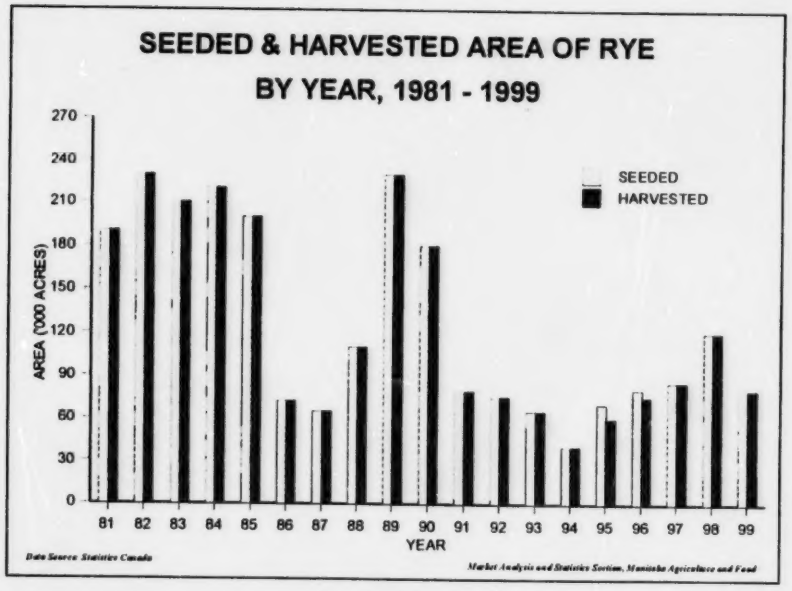
RYE AND RYE PRODUCTS SECTOR

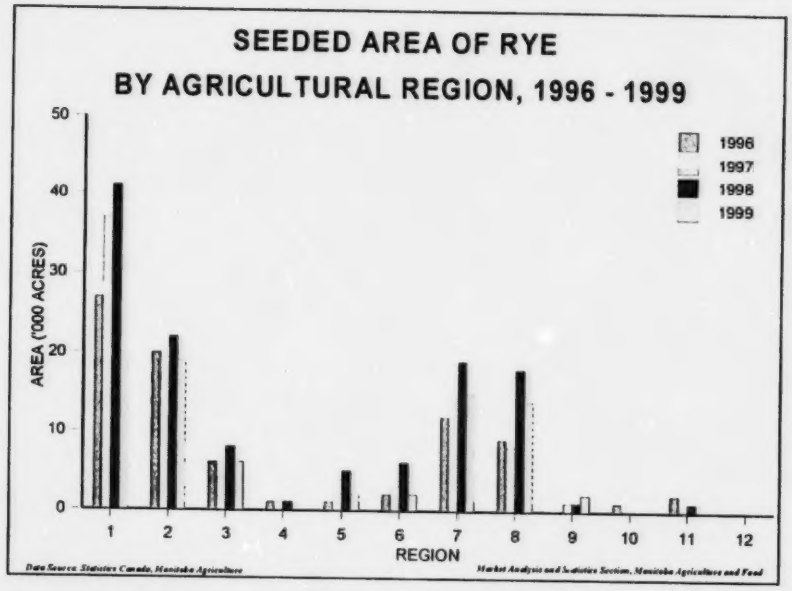
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	760	760	900	760	84
CROP PRODUCTION:					
Seeded Area ('000 acres):	80	85	120	80	67
% of Canada	17.4	21.1	21.3	17.3	
Harvested Area ('000 acres):	75	85	120	80	67
Yield/acre (bushels):	34.6	28.8	35.0	37.5	107
Production (million bushels):	2.6	2.5	4.2	3.0	71
% of Canada	21.3	19.5	26.8	19.7	
Average Price ($/bu):	3.86	3.90	2.33	1.71	73
VALUE OF PRODUCTION ($ million):	10.0	9.6	9.8	5.1	52
ESTIMATED TOTAL EXPENSES ($/acre):	147.70	147.73	148.18	148.80	100
CASH RECEIPTS ($ million):	10.1	9.0	5.1	5.2	102
% of Canada	25.8	26.5	25.6	29.7	
ESTIMATED QUALITY OF RYE CROP (% protein content):					
All Grades	10.3	11.0	N/A	N/A	
1CW	10.3	11.0	N/A	N/A	
2CW	10.2	11.2	N/A	N/A	
3CW	9.7	10.8	N/A	N/A	
CROP DISPOSITION (thousand bu.):	2,677	2,449	4,240	4,181	99
Marketings	2,330	2,070	2,940	2,720	93
Seed Requirements	122	146	100	71	71
Feed, Waste & Dockage	225	194	20	603	3,015
Carryover, July 31	0	39	1,180	787	67
EXPORTS ($ thousand):	8,659.1	11,369.5	5,378.4	4,268.2	79
Unprocessed	8,646.6	11,369.5	5,378.4	4,268.2	79
Processed	12.5	0	0	0	0
IMPORTS ($ thousand):	27.3	30.9	54.3	238.4	439
Unprocessed	0.0	0.0	15.0	218.9	1,459
Processed	27.3	30.9	39.2	19.5	50

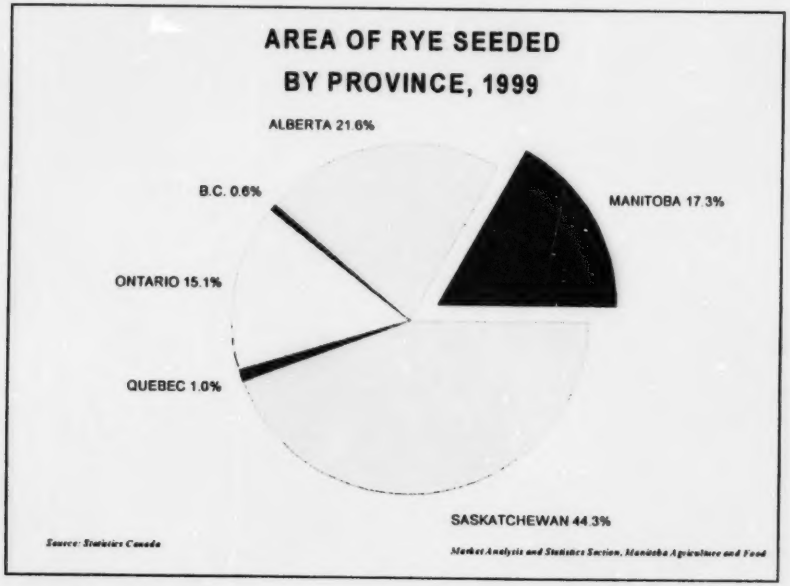
RYE INDUSTRY CHART, 1999

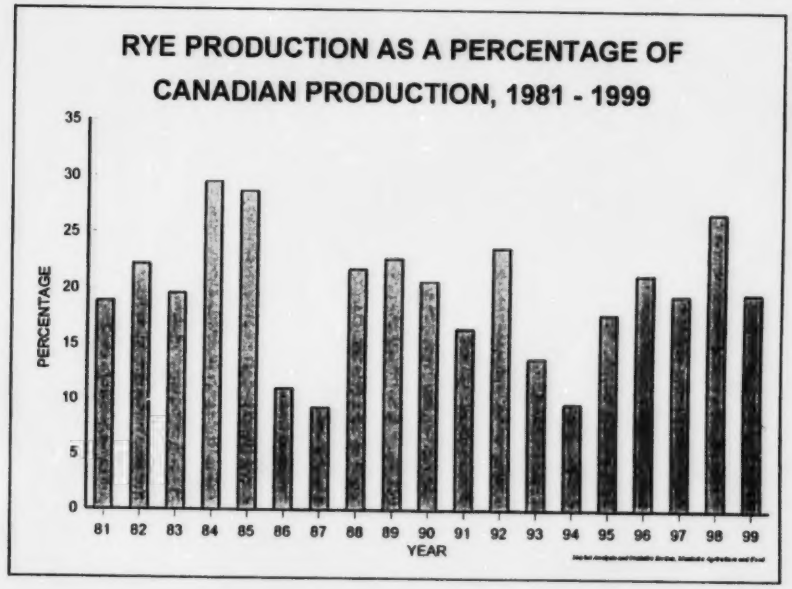


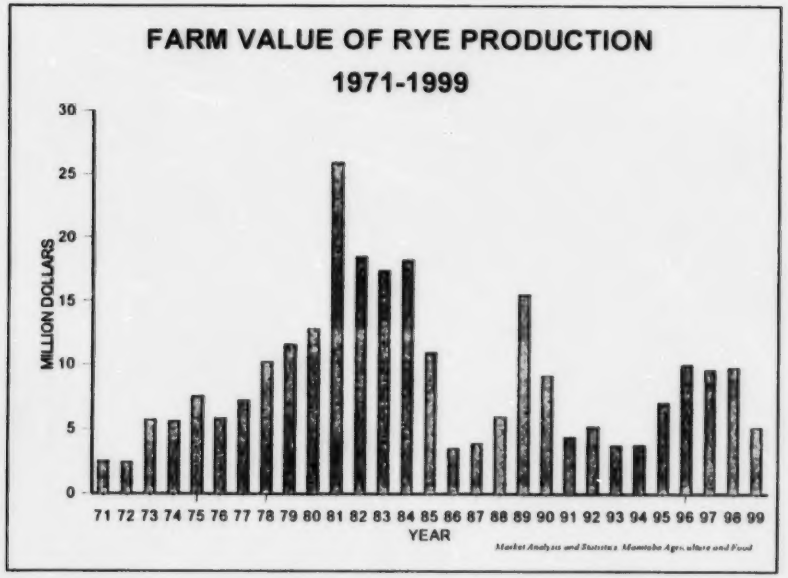
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

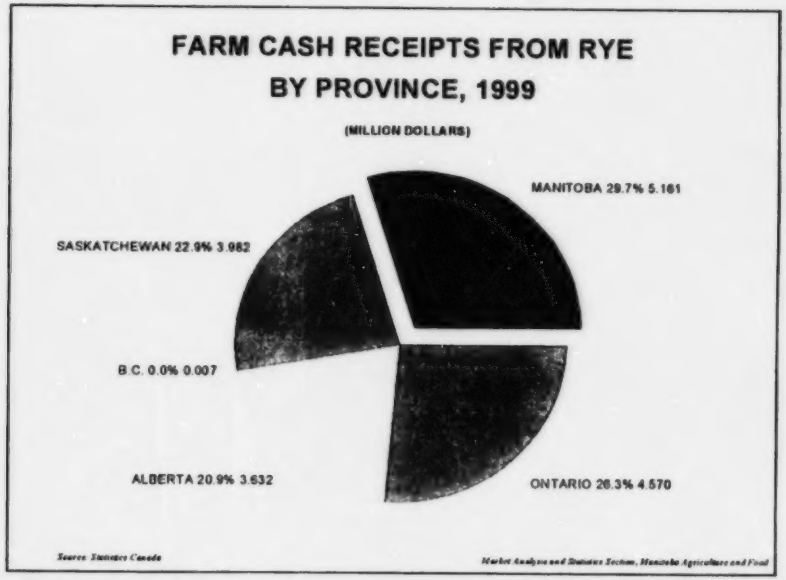

SEEDED & HARVESTED AREA OF RYE
BY YEAR, 1981 - 1999
AREA ('000 ACRES)
270
240
210
180
150
120
90
60
30
0
SEEDED
HARVESTED
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

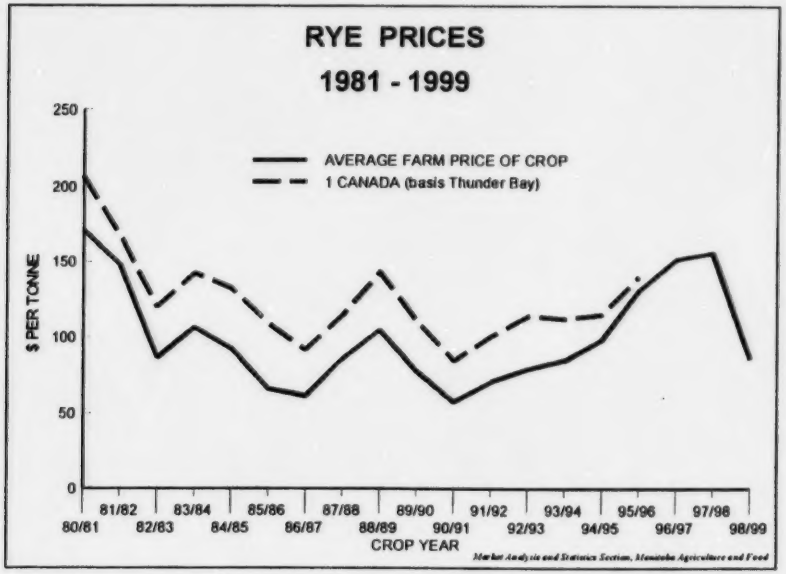

SEEDED AREA OF RYE
BY AGRICULTURAL REGION, 1996 - 1999
AREA ('000 ACRES)
50
40
30
20
10
0
1996
1997
1998
1999
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

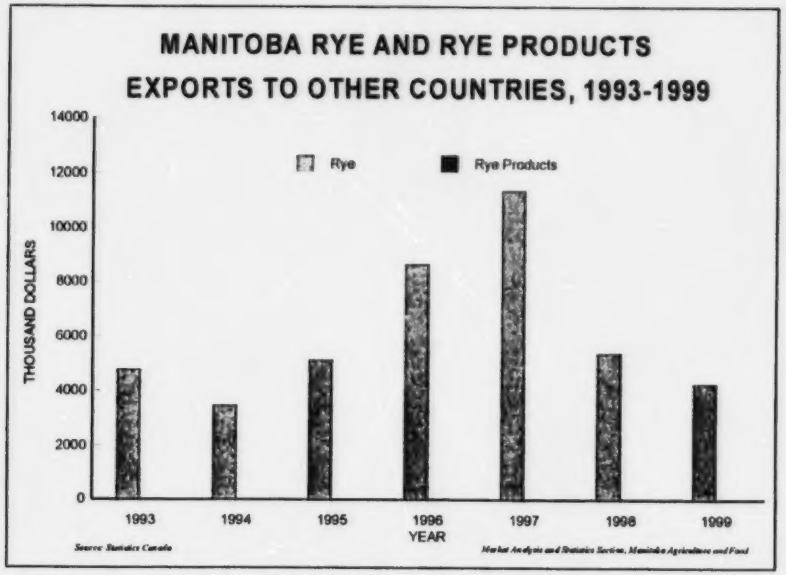

AREA OF RYE SEEDED
BY PROVINCE, 1999
ALBERTA 21.6%
B.C. 0.6%
MANITOBA 17.3%
ONTARIO 15.1%
QUEBEC 1.0%
SASKATCHEWAN 44.3%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

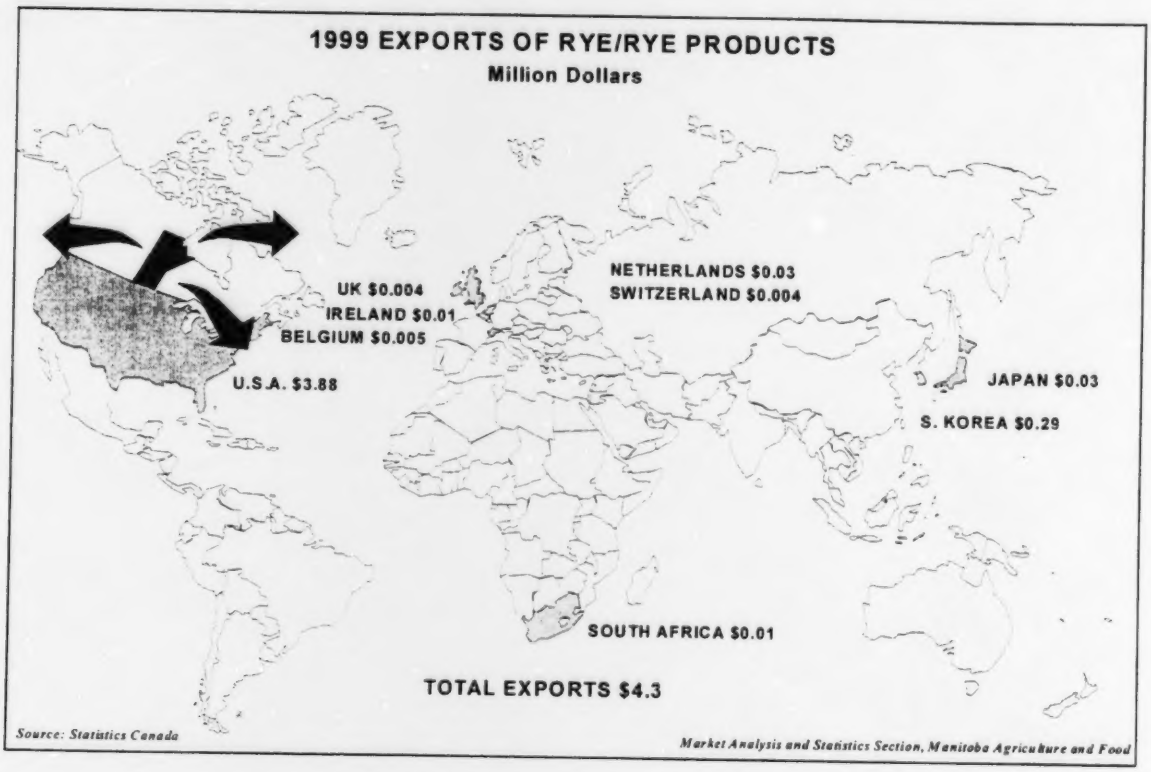

RYE PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981 - 1999
PERCENTAGE
35
30
25
20
15
10
5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR

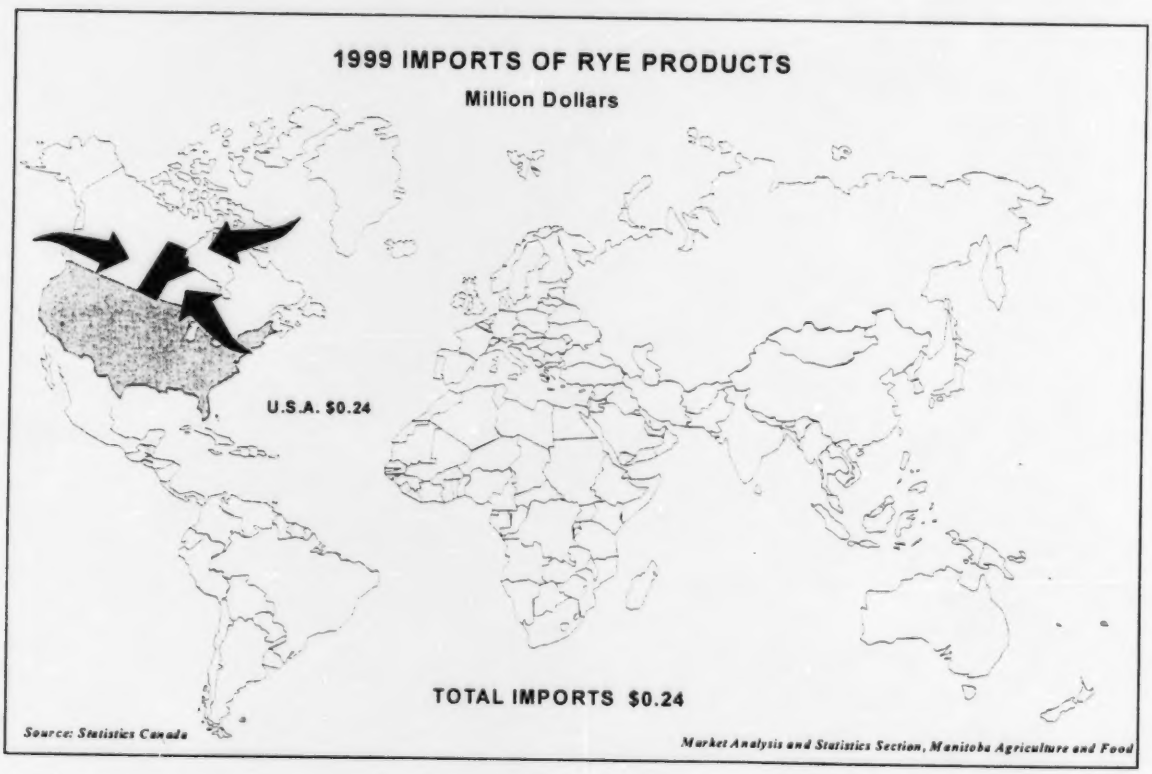

FARM VALUE OF RYE PRODUCTION
1971-1999
MILLION DOLLARS
30
25
20
15
10
5
0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics, Manitoba Agriculture and Food


FARM CASH RECEIPTS FROM RYE
BY PROVINCE, 1999
(MILLION DOLLARS)
MANITOBA 29.7% 5.161
SASKATCHEWAN 22.9% 3.982
B.C. 0.0% 0.007
ALBERTA 20.9% 3.632
ONTARIO 26.3% 4.570
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

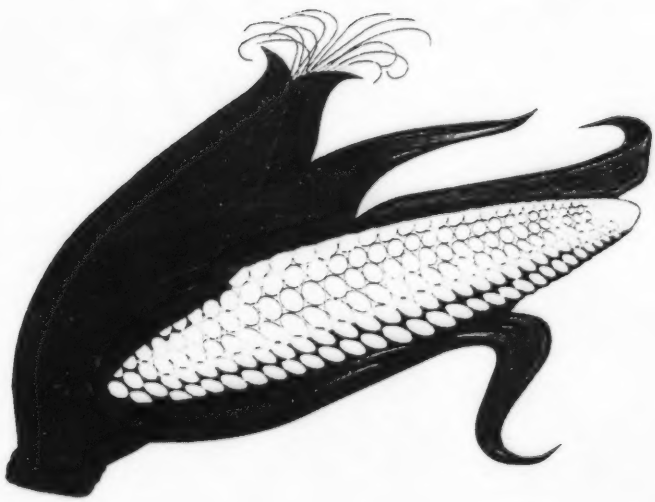

RYE PRICES
1981 - 1999
AVERAGE FARM PRICE OF CROP
1 CANADA (basis Thunder Bay)
$ PER TONNE
250
200
150
100
50
0
80/81 81/82 82/83 83/84 84/85 85/86 86/87 87/88 88/89 89/90 90/91 91/92 92/93 93/94 94/95 95/96 96/97 97/98 98/99
CROP YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MANITOBA RYE AND RYE PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993-1999
Rye
Rye Products
THOUSAND DOLLARS
14000
12000
10000
8000
6000
4000
2000
0
1993 1994 1995 1996 1997 1998 1999
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 EXPORTS OF RYE/RYE PRODUCTS
Million Dollars
UK $0.004
IRELAND $0.01
BELGIUM $0.005
U.S.A. $3.88
NETHERLANDS $0.03
SWITZERLAND $0.004
JAPAN $0.03
S. KOREA $0.29
SOUTH AFRICA $0.01
TOTAL EXPORTS $4.3
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF RYE PRODUCTS
Million Dollars
U.S.A. $0.24
TOTAL IMPORTS $0.24
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

GRAIN CORN SECTOR



GRAIN CORN SECTOR PROFILE

Production:

Manitoba producers grew very little corn for grain prior to 1978, when 88,000 acres were harvested. Harvested areas were greatest in the early 1980s, reaching a record 225,000 acres in 1981. Lower prices and adverse weather conditions led to smaller areas of grain corn being harvested between 1992 and 1995. The area seeded to grain corn increased from 45,000 acres in 1995 to 110,000 acres in 1999. In addition, 25,000 acres of corn was grown for silage purposes in 1999. From a peak production of 17.0 million bushels in 1981, the grain corn crop declined to 1.4 million bushels in 1992, but increased to 9.4 million bushels in 1999. This was up by 10.6 percent from the previous year. Manitoba produced almost all of the 1999 Western Canadian grain corn crop, but only 2.6 percent of total Canadian corn production.

Yields averaged 94.0 bushels per acre in 1999, just below the record 94.4 bushels per acre in 1998 and well above the 10-year average of 76.0 bushels per acre.

Average grain corn prices rose from $2.35 per bushel for the 1992 crop to a record $4.50 for the 1995 crop. The price decreased each year after that to average $2.54 per bushel in 1999. The total value of the Manitoba corn crop was highest in 1981, at $45.8 million, but in 1992, the value dropped to the lowest level, $3.3 million, for the period, 1976-1999. A larger crop almost offset the effect of lower prices, resulting in a 1.2 percent decrease in the value of grain corn production from $24.2 million in 1998 to $23.9 million in 1999.

Estimated farm expenses for grain corn production, including operating, labour and fixed costs, rose from $234.05 per acre in 1992 to $269.10 per acre in 1996, but declined to $255.32 per acre in 1997. Expenses rose again to $268.80 per acre in 1999.

Marketing:

Annual cash receipts from the sector increased over the past six years, rising from $1.7 million in 1993 to $19.2 million in 1999. Manitoba's contribution to Canadian grain corn receipts rose from 0.4 percent in 1993 to 2.8 percent in 1998, but decreased to 2.6 percent in 1999.

All the corn produced in 1999 was sold to feed mills, grain handling firms or fed on farms. Any crop carryover at August 1 is used for pre-harvest feeding or distilling requirements.

Processing:

The distillery at Gimli uses about 1.8-2.0 million bushels of corn annually, the equivalent of 20-35 percent of Manitoba's crop. Manitoba farmers have provided much of the distillery requirements for high quality corn, except in the years 1985, 1986, 1992 and 1993, when Manitoba grain corn production and quality were low and virtually all the corn requirements of the distillery had to be met by U.S. suppliers. Corn is also processed and used for hog and poultry feed. Fodder corn silage, including stalks and stems, is fed to dairy and beef cattle.

Trade:

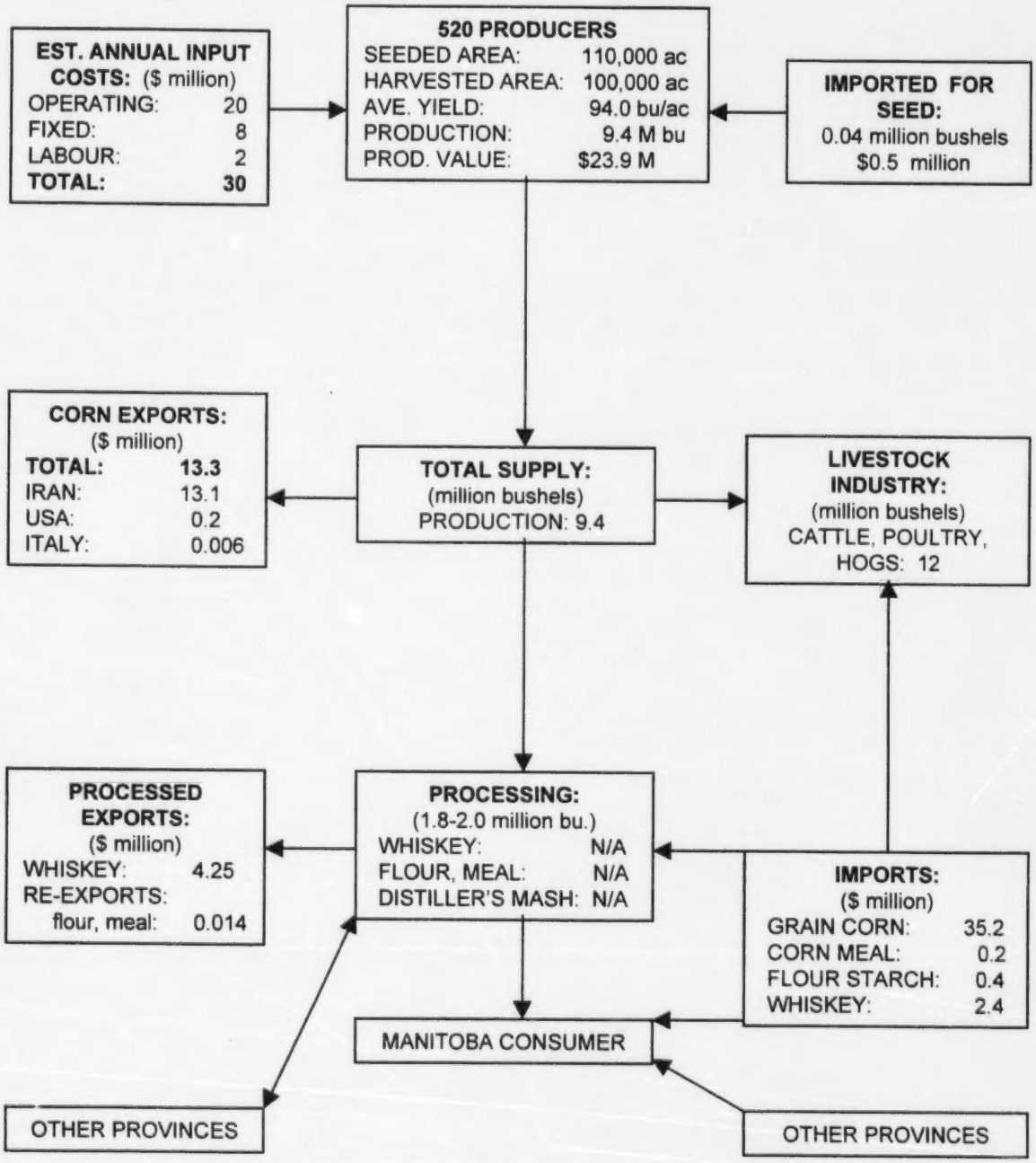
Exports of corn to other countries decreased in value from $1.1 million in 1997 to $0.07 million in 1998, but rose significantly to $13.3 million in 1999. The United States is usually the primary market for Manitoba corn exports, but in 1999, corn sales to Iran were valued at $13.1 million. Whiskey exports totalled $1.0 million in 1996. There were no whiskey exports in 1997, but exports increased to $2.03 million in 1998 and $4.25 million in 1999. Small amounts of corn meal were re-exported.

Imports of corn from the U.S., mainly for processing into hog and poultry feed, were valued at $24.5 million in 1998, but rose to $35.2 million in 1999, including corn imported for seed valued at $0.5 million. Corn flour, meal and starch imports amounted to $0.6 million and whiskey imports totalled $2.4 million in 1999.

GRAIN CORN AND GRAIN CORN PRODUCTS SECTOR

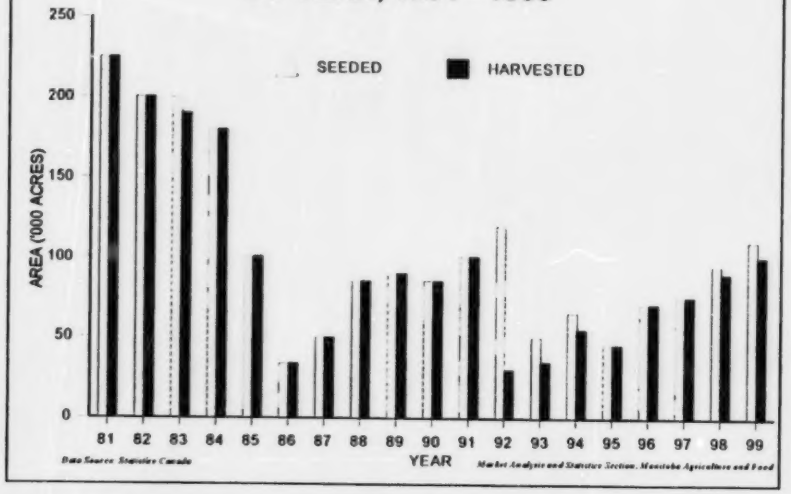
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	363	360	450	520	116
CROP PRODUCTION:					
Seeded Area ('000 acres):	70.0	75.0	95.0	110.0	116
% of Canada	2.6	2.9	3.4	3.8	
Harvested Area ('000 acres):	70.0	75.0	90.0	100.0	111
Yield/acre (bushels):	80.0	80.0	94.4	94.0	100
Production (million bushels):	5.6	6.0	8.5	9.4	111
% of Canada	2.0	2.1	2.4	2.6	
Average Price ($/bu):	3.63	3.28	2.85	2.54	89
VALUE OF PRODUCTION ($ million):	20.3	19.7	24.2	23.9	99
ESTIMATED TOTAL EXPENSES ($/acre):	269.10	255.32	260.42	268.80	103
CASH RECEIPTS ($ million):	15.3	16.3	17.8	19.2	108
% of Canada	1.9	2.3	2.8	2.6	
EXPORTS ($ million):	1.3	1.3	2.1	17.5	833
Unprocessed	0.2	1.1	0.07	13.3	-
Processed:	1.2	0.2	2.03	4.26	210
Whiskey	1.0	0	2.03	4.25	209
Other	0.2	0.2	0.003	0.014	467
IMPORTS ($ million):	27.7	21.3	26.7	38.1	143
Unprocessed:	22.1	18.3	24.5	35.2	144
For seed	0.7	0.2	0.3	0.5	167
Other: ($ million)	21.4	18.1	24.2	34.7	143
(million bushels)	4.9	4.5	6.4	9.5	148
Processed:	5.6	3.0	2.2	3.0	136
Whiskey	1.6	1.8	1.7	2.4	141
Other	4.0	1.2	0.6	0.6	100

GRAIN CORN INDUSTRY CHART, 1999

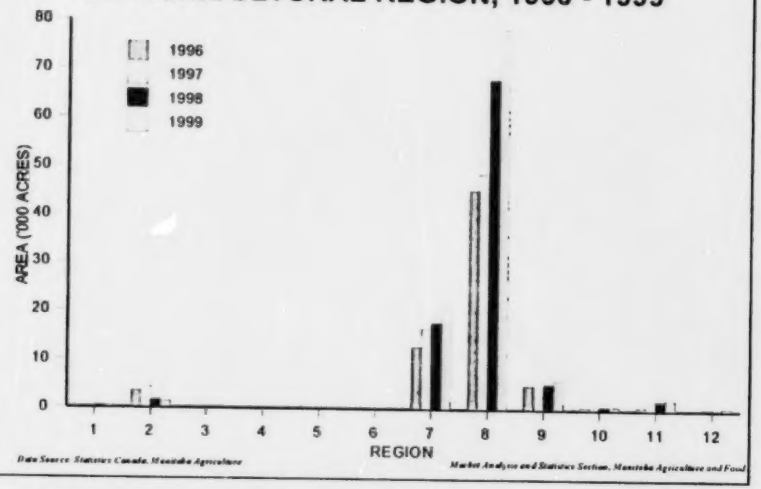


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

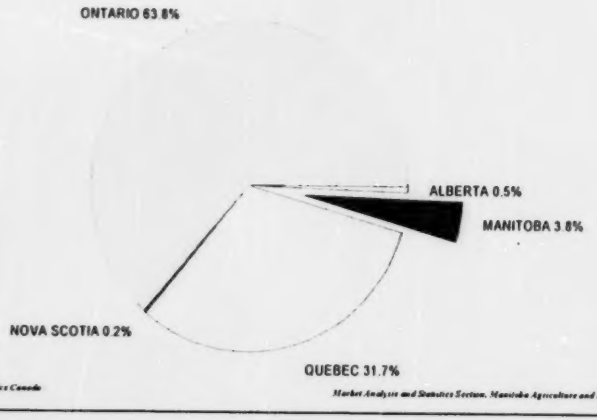
SEEDED & HARVESTED AREA OF GRAIN CORN BY YEAR, 1981 - 1999



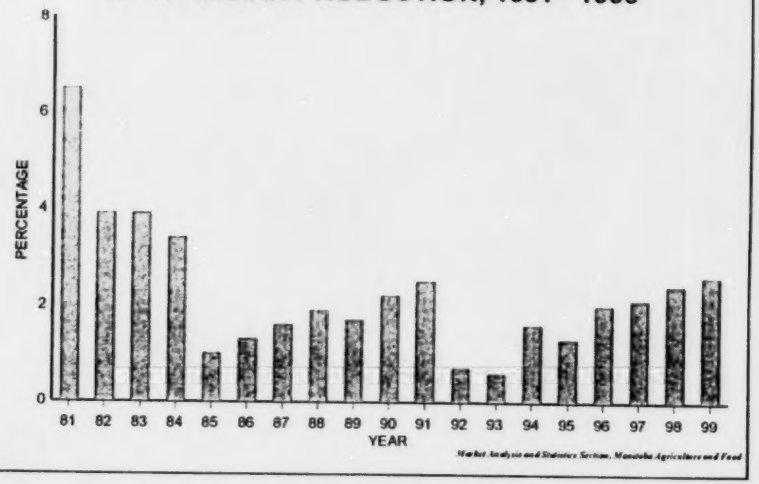
SEEDED AREA OF GRAIN CORN BY AGRICULTURAL REGION, 1996 - 1999



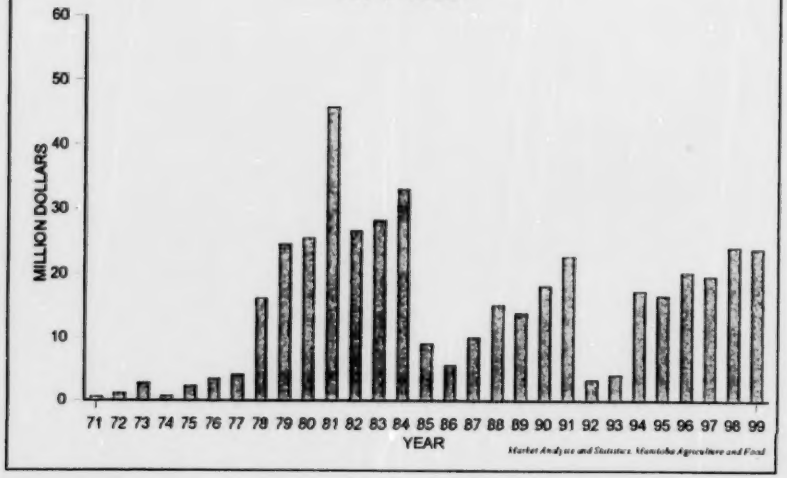
AREA OF GRAIN CORN SEEDED BY PROVINCE, 1999



GRAIN CORN PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981 - 1999

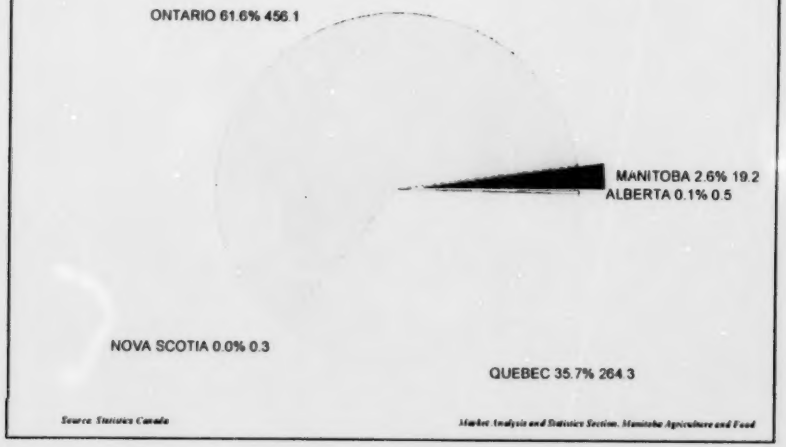


FARM VALUE OF GRAIN CORN PRODUCTION 1971-1999

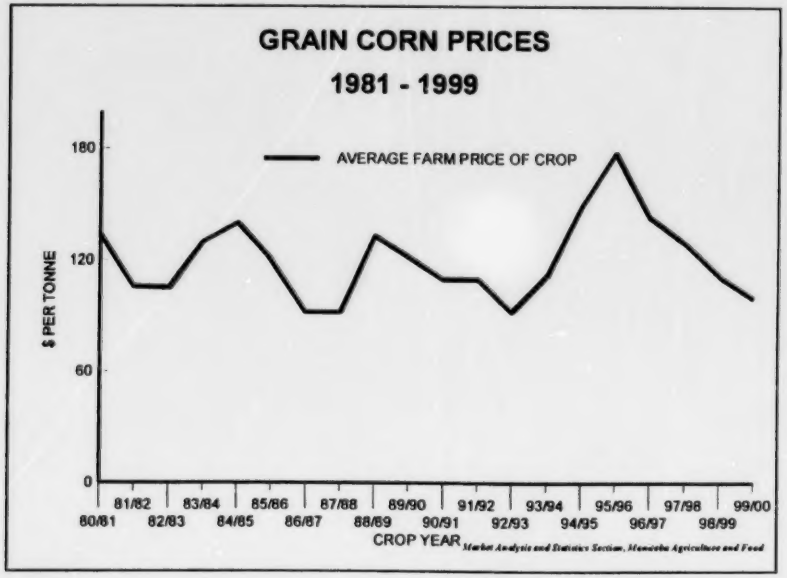


FARM CASH RECEIPTS FROM GRAIN CORN BY PROVINCE, 1999

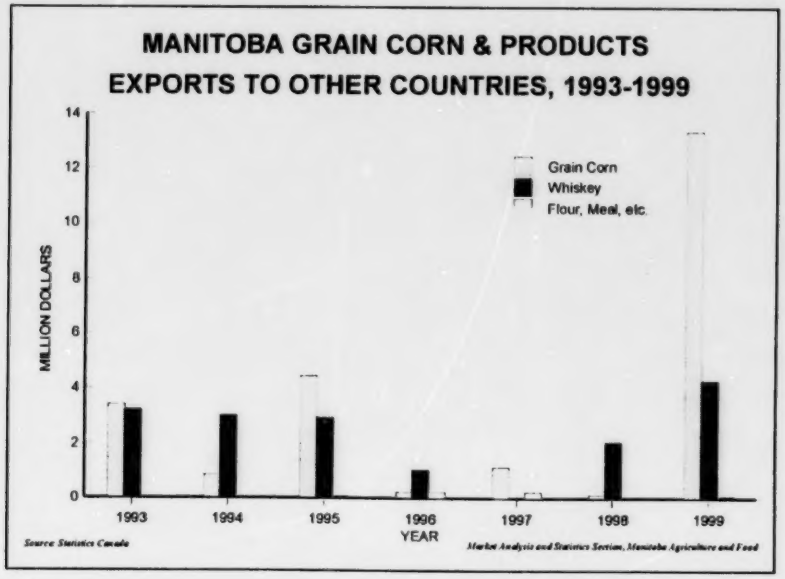
(MILLION DOLLARS)

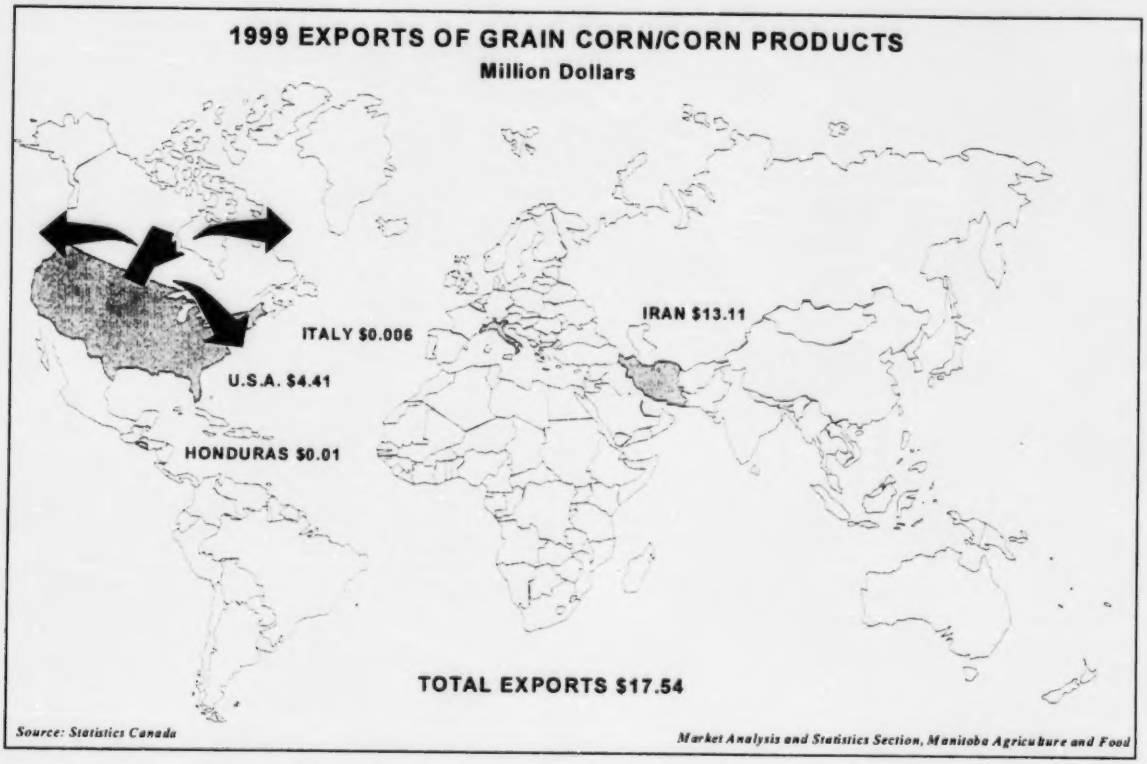

ONTARIO 61.6% 456.1
MANITOBA 2.6% 19.2
ALBERTA 0.1% 0.5
NOVA SCOTIA 0.0% 0.3
QUEBEC 35.7% 264.3
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

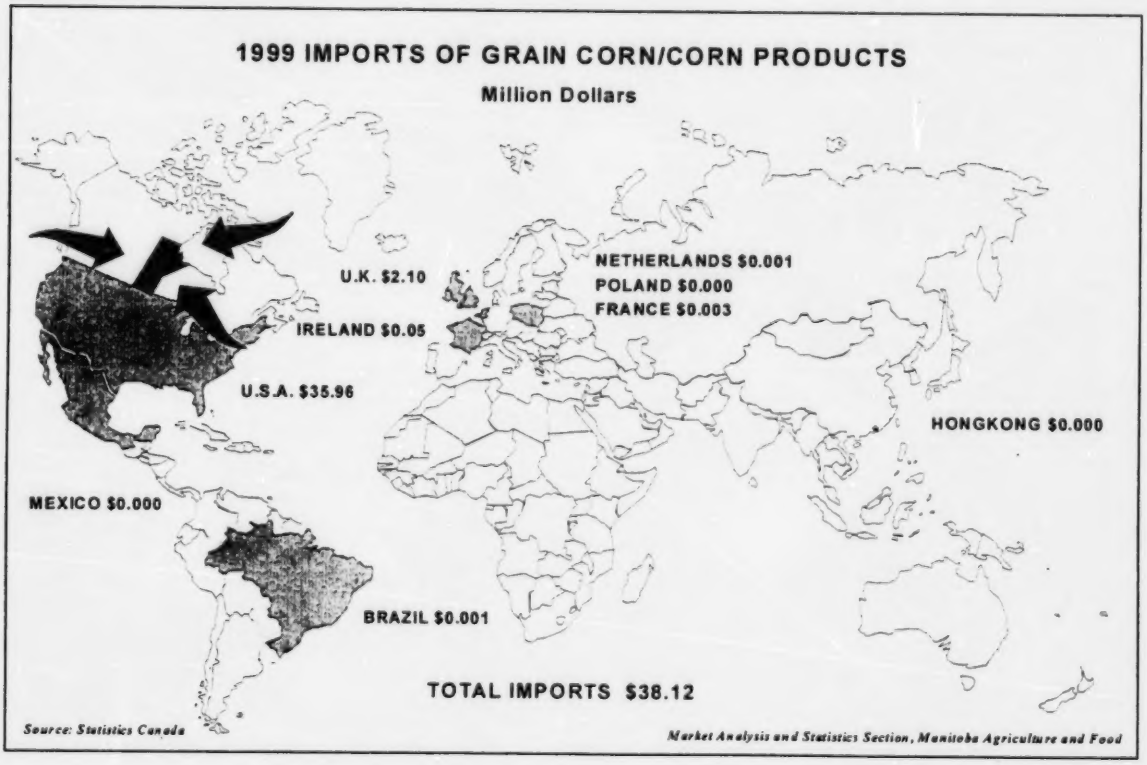
GRAIN CORN PRICES 1981 - 1999


AVERAGE FARM PRICE OF CROP
$ PER TONNE
180
120
60
0
81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/00
80/81 82/83 84/85 86/87 88/89 90/91 92/93 94/95 96/97 98/99
CROP YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

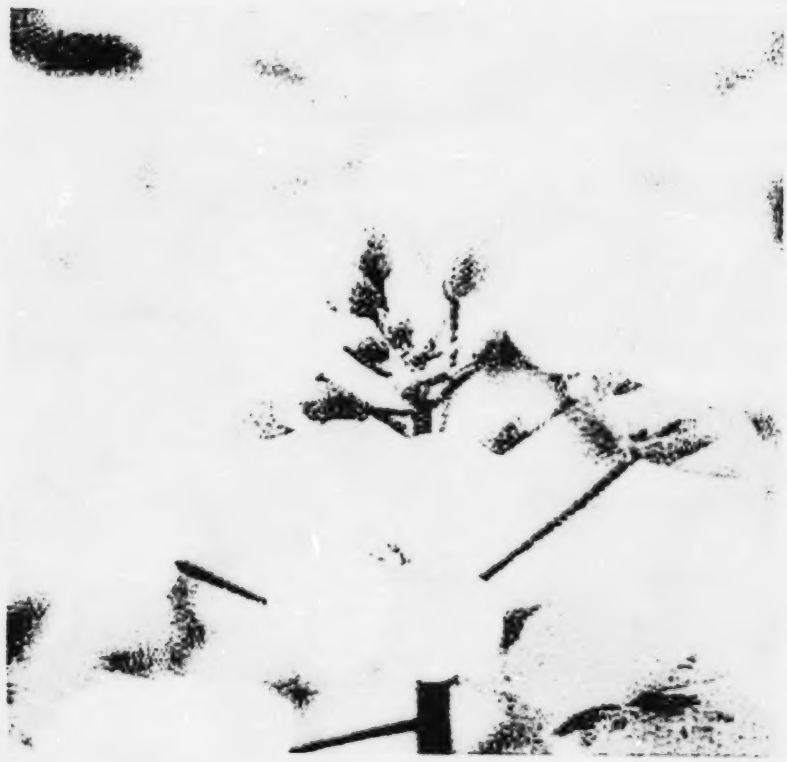
MANITOBA GRAIN CORN & PRODUCTS EXPORTS TO OTHER COUNTRIES, 1993-1999




1999 EXPORTS OF GRAIN CORN/CORN PRODUCTS
Million Dollars
ITALY $0.006
U.S.A. $4.41
HONDURAS $0.01
IRAN $13.11
TOTAL EXPORTS $17.54
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF GRAIN CORN/CORN PRODUCTS
Million Dollars
U.K. $2.10
IRELAND $0.05
U.S.A. $35.96
MEXICO $0.000
BRAZIL $0.001
NETHERLANDS $0.001
POLAND $0.000
FRANCE $0.003
HONGKONG $0.000
TOTAL IMPORTS $38.12
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

CANOLA SECTOR



CANOLA SECTOR PROFILE

Production:

Rapeseed was introduced as an alternative crop for Manitoba producers during World War II. The crop increased in significance in the late 1960s-early 1970s when research and development of canola produced varieties with oil suitable for human consumption and meal for livestock feed.

The area seeded to canola (rapeseed) in Manitoba rose from 29,300 acres in 1961 to 581,000 acres ten years later. The canola area ranged between 250,000 acres and 1.9 million acres until 1994 when 2.55 million acres were seeded. Forecasts of high grain prices in 1995 as well as the necessity of crop rotation led to a decrease of 8 percent in canola acres seeded in 1995 and a further drop of 33 percent to 1.57 million acres in 1996. The area seeded to canola rebounded to 2.4 million acres in 1997 and peaked in 1998 at 2.75 million acres, of which 2.73 million acres were harvested. 1998 canola production of 79.5 million bushels was also a record. However, a significant decline in canola prices led to the ten percent decline in seeded and harvested areas to 2.48 and 2.46 million acres respectively in 1999. Manitoba produced 75.3 million bushels in 1999, which was 19.4 percent of the Canadian canola crop, down from 23.6 percent in 1998.

Yields, averaging 30.6 bushels per acre in 1999, *were the largest on record*, compared to a 10-year average of 27.0 bushels per acre and 29.1 bushels per acre in 1998. The average price of canola rose steadily from $5.35 per bushel for the 1991 crop to a high of $8.73 for the 1996 crop, but declined each year to $5.33 per bushel for the 1999 crop.

The total value of the Manitoba canola crop peaked in 1998, at $604 million, but decreased by a third to $401.3 million in 1999. Canola was the most valuable crop in Manitoba for the third year, ahead of wheat and hay.

Estimated farm expenses, including operating, labour and fixed costs, for canola production rose from $162.65 per acre in 1992 to $221.31 per acre in 1999 due mainly to increases in fertilizer and pesticide costs.

Marketing:

Annual canola cash receipts rose from $197.1 million in calendar year 1992 to $622.3 million in 1998, but fell by 43 percent to $355.7 million in 1999. Manitoba's contribution to Canadian canola receipts was 20.1 percent in 1999, down from 23.4 percent in 1998.

About 78 percent of the 1999 canola samples tested by the Canadian Grain Commission graded 1Canada, with an average of 42.3 percent oil and 21.7 percent protein, and 18 percent graded 2Canada. Canola marketings increased from 44.0 million bushels in 1996/97 to 72.0 million bushels in 1998/99. Canola carryover rose from 0.4 million bushels in 1997/98 to 3.5 million bushels at the end of the 1998/99 crop year.

Processing:

Canola is processed by two crushing plants owned by CanAmera, one at Altona and the other at Harrowby on the Saskatchewan border. Together the two plants have a crushing capacity of 28 million bushels per year and both have refining capacity. Output from the plants includes bulk crude and refined oil, bulk vegetable oil, retail pack refined oil, hulls and screenings. Canola meal is a by-product used for livestock feed. A new cold-crush plant was built in Ste. Agathe in 1997, but only crushed minimal amounts of canola in 1998 and 1999 due to financial difficulties.

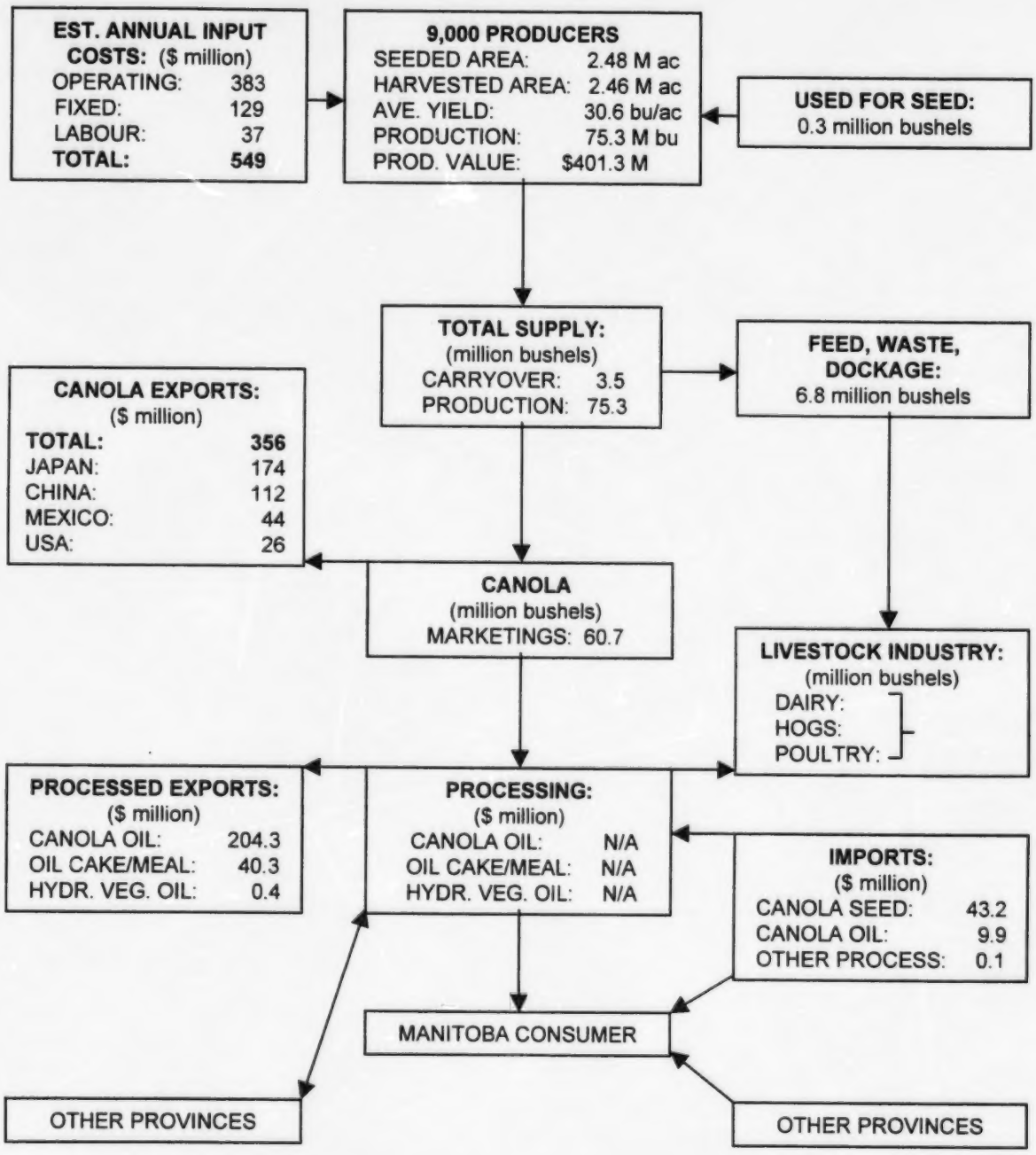
Trade:

Manitoba exported canola seed valued at $355.8 million in 1999 to 20 countries, such as Japan, China, Mexico and U.S.A. Crude canola oil exports totalled $204.3 million in 1999, while hydrogenated oil and canola meal were valued at $0.4 million and $40.3 million respectively. Manitoba processors accept deliveries of U.S. canola seed, and in 1999, seed imports amounted to $43.2 million. Manitoba also produces and exports high-erucic rapeseed under contract for industrial use in the U.S.

CANOLA AND CANOLA PRODUCTS SECTOR

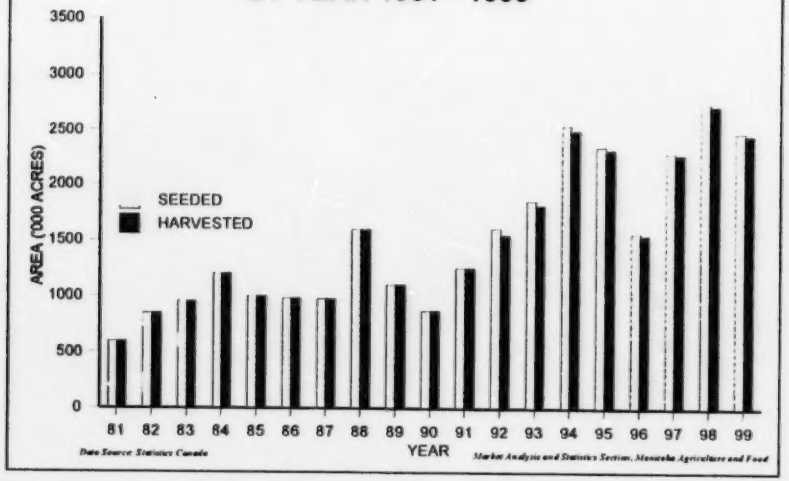
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	7,500	9,000	9,500	9,000	95
CROP PRODUCTION:					
Seeded Area ('000 acres):	1,570	2,370	2,750	2,480	90
% of Canada	17.7	19.1	20.3	17.9	
Harvested Area ('000 acres):	1,550	2,280	2,730	2,460	90
Yield/acre (bushels):	30.4	28.9	29.1	30.6	105
Production (million bu):	47.1	66.0	79.5	75.3	95
% of Canada	21.2	24.2	23.6	19.4	
Average Price ($/bu):	8.73	8.39	7.60	5.33	70
VALUE OF PRODUCTION ($ million):	411.3	553.9	604.0	401.3	66
ESTIMATED TOTAL EXPENSES: ($/acre)	218.08	220.38	221.04	221.31	100
CASH RECEIPTS ($ million):	397.0	471.9	622.3	355.7	57
% of Canada	20.2	22.2	23.4	20.1	
EST. AV. QUALITY OF CANOLA CROP:					
1Canada - Oil content (%)	42.1	41.9	43.1	42.3	98
1Canada - Protein content (%)	21.4	22.1	21.6	21.7	100
2Canada - Oil content (%)	40.9	41.0	42.2	41.3	98
2Canada - Protein content (%)	22.3	23.0	22.4	22.5	100
3Canada - Oil content (%)	41.1	40.8	44.4	42.1	95
3Canada - Protein content (%)	22.4	23.1	22.8	21.7	95
CROP DISPOSITION (million bu):	49.3	68.2	79.0	78.8	100
Marketings	44.0	62.2	72.0	60.7	84
Seed Requirements	0.3	0.4	0.3	0.3	100
Feed, Waste & Dockage	2.8	5.1	3.1	6.8	219
Carryover, July 31	2.2	0.4	3.5	11.0	314
EXPORTS ($ million):	516.5	542.9	999.2	600.9	60
Unprocessed	238.3	278.3	454.7	355.8	78
Processed	278.2	264.6	544.5	245.1	45
IMPORTS ($ million):	14.9	21.7	44.7	53.2	119
Unprocessed	14.2	17.1	33.6	43.2	129
Processed	0.7	4.6	11.0	10.0	91

CANOLA INDUSTRY CHART, 1999

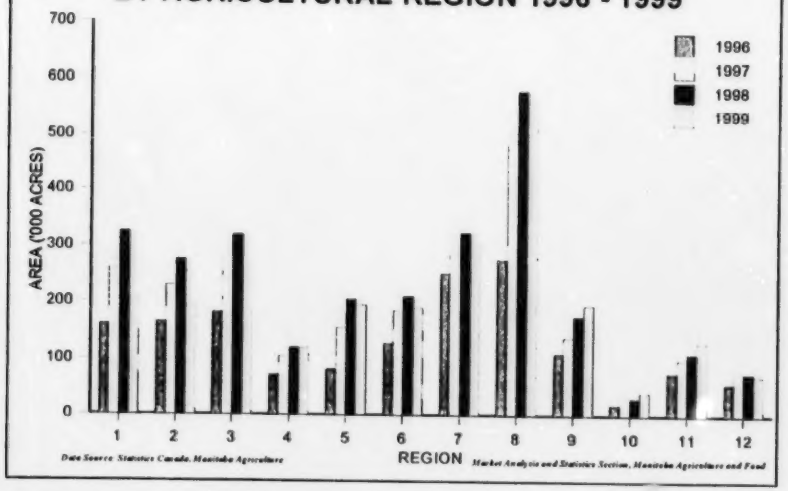


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

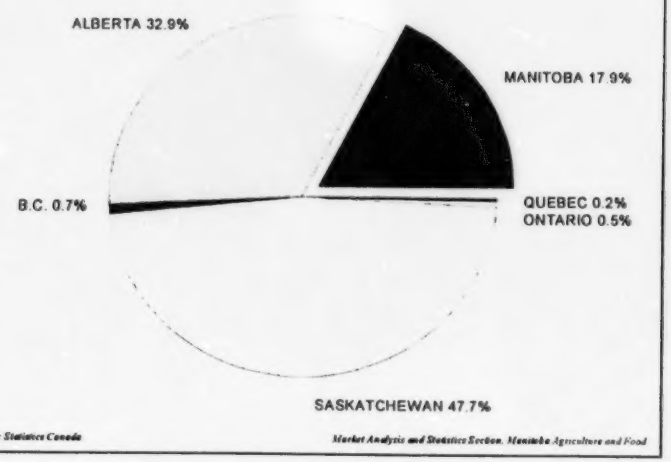
SEEDED & HARVESTED AREA OF CANOLA BY YEAR 1981 - 1999



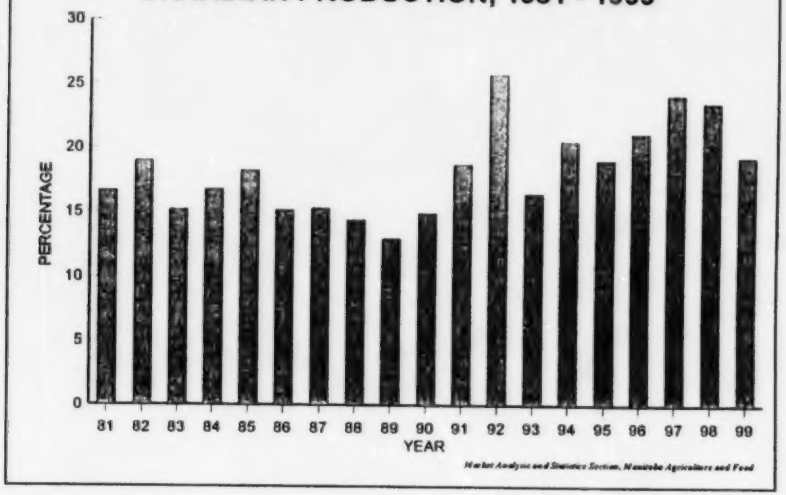
SEEDED AREA OF CANOLA BY AGRICULTURAL REGION 1996 - 1999



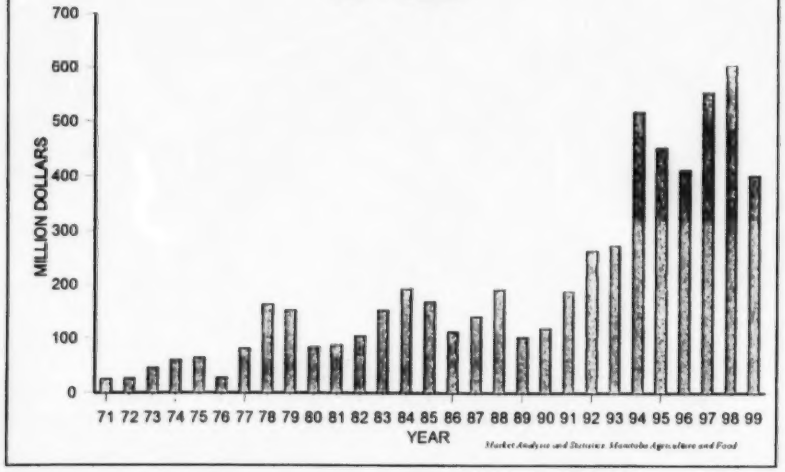
AREA OF CANOLA SEEDED BY PROVINCE, 1999



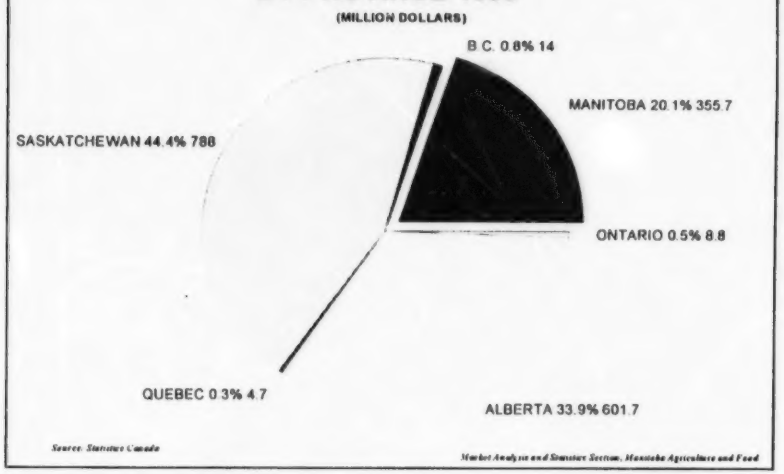
CANOLA PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981 - 1999



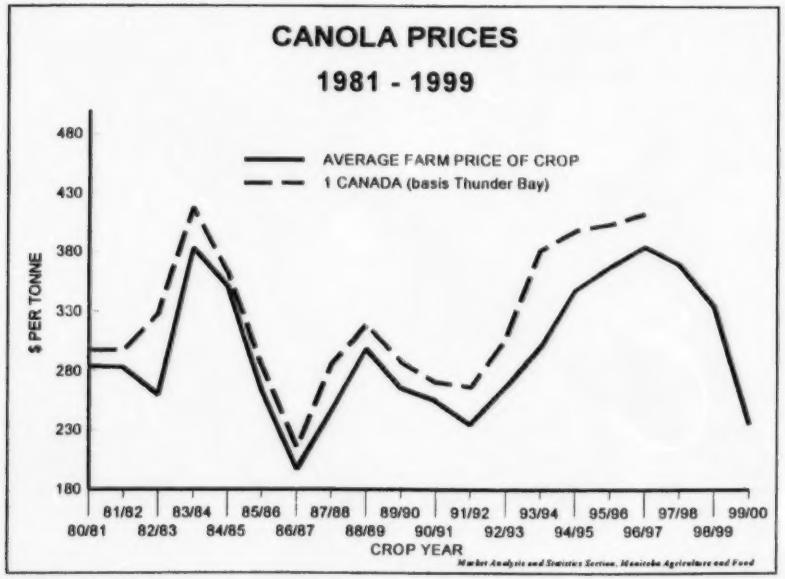
FARM VALUE OF CANOLA PRODUCTION
1971-1999



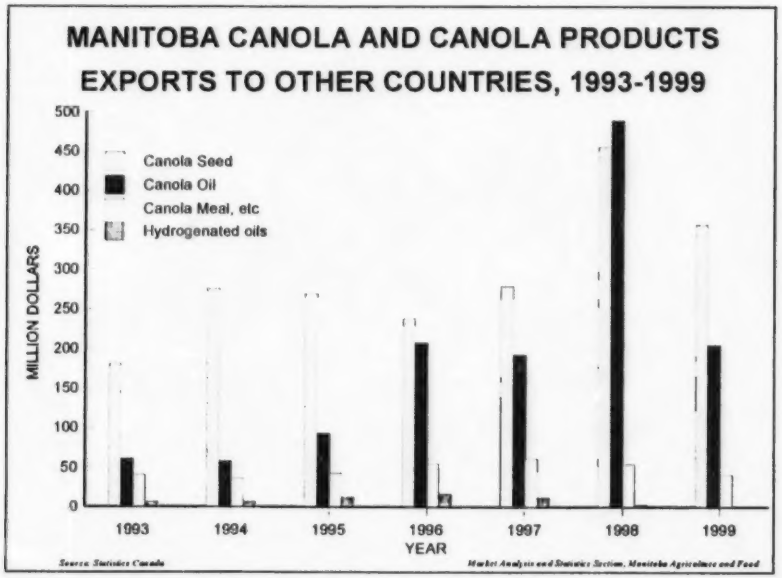
FARM CASH RECEIPTS FROM CANOLA
BY PROVINCE 1999

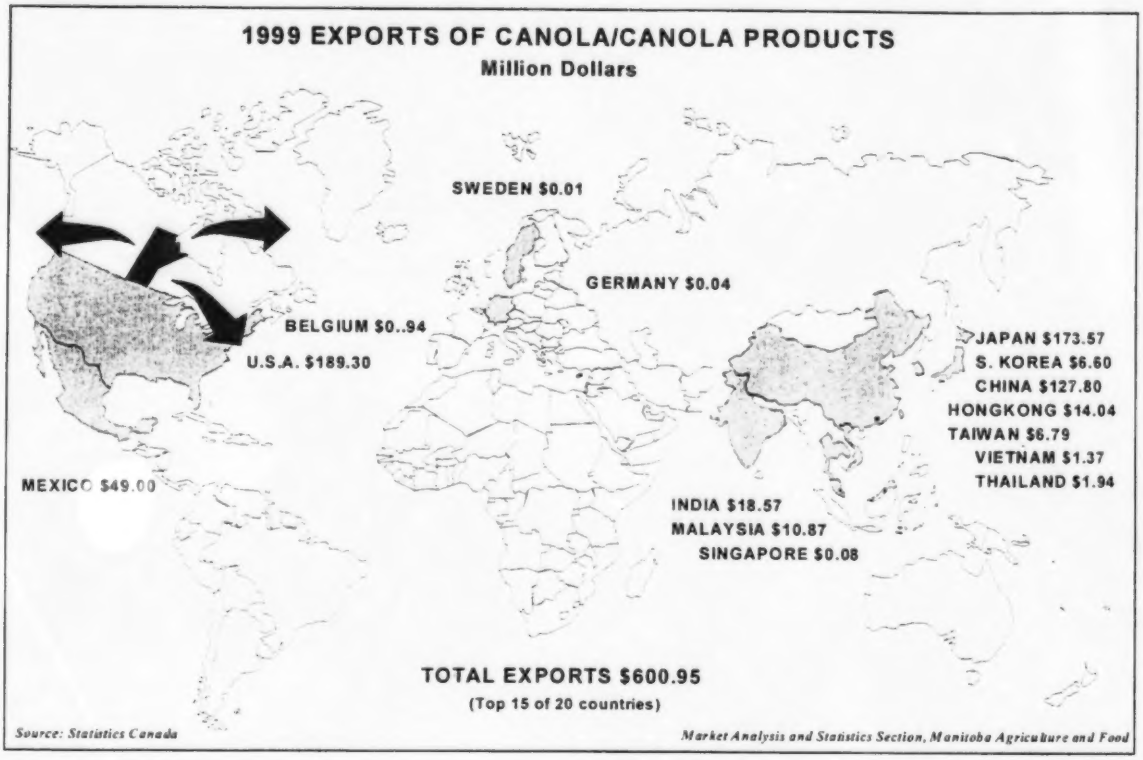


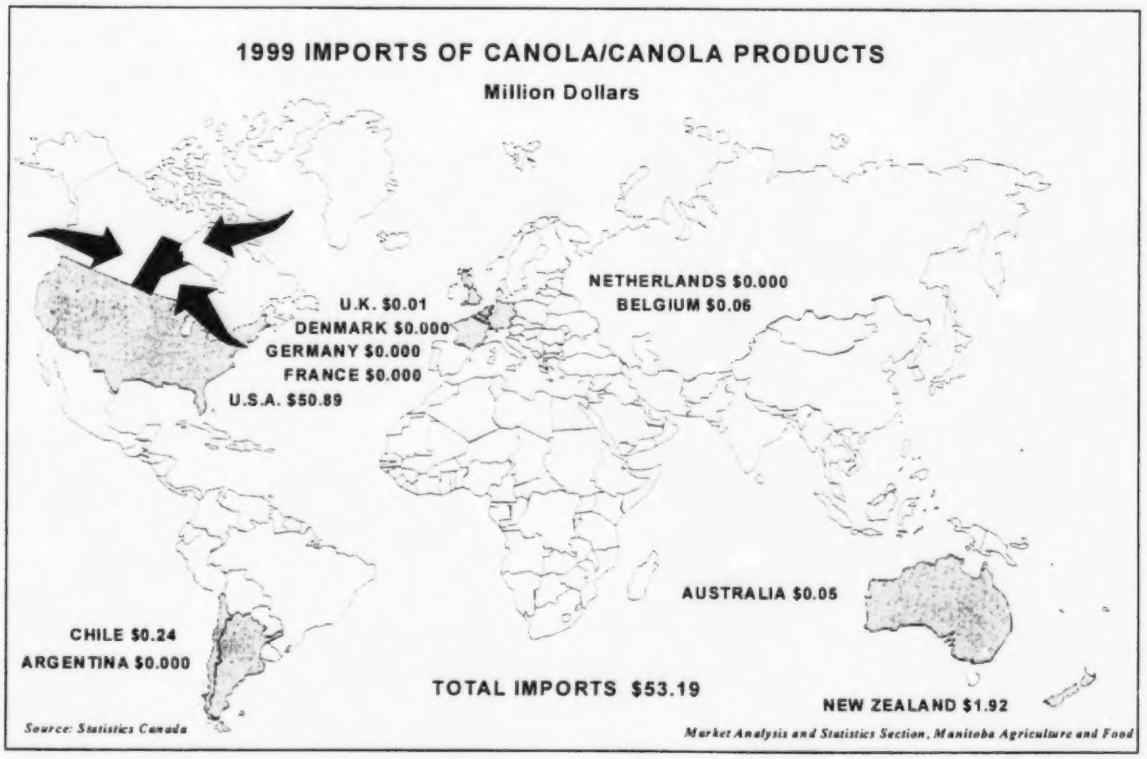
CANOLA PRICES
1981 - 1999



MANITOBA CANOLA AND CANOLA PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993-1999




1999 EXPORTS OF CANOLA/CANOLA PRODUCTS
Million Dollars
SWEDEN $0.01
GERMANY $0.04
BELGIUM $0..94
U.S.A. $189.30
MEXICO $49.00
JAPAN $173.57
S. KOREA $6.60
CHINA $127.80
HONGKONG $14.04
TAIWAN $6.79
VIETNAM $1.37
THAILAND $1.94
INDIA $18.57
MALAYSIA $10.87
SINGAPORE $0.08
TOTAL EXPORTS $600.95
(Top 15 of 20 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF CANOLA/CANOLA PRODUCTS
Million Dollars
U.K. $0.01
DENMARK $0.000
GERMANY $0.000
FRANCE $0.000
U.S.A. $50.89
NETHERLANDS $0.000
BELGIUM $0.06
AUSTRALIA $0.05
CHILE $0.24
ARGENTINA $0.000
TOTAL IMPORTS $53.19
NEW ZEALAND $1.92
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FLAXSEED SECTOR

FLAXSEED SECTOR PROFILE

Production:

One of three provinces producing flaxseed, Manitoba has been growing the crop since the late 1800s. Flaxseed only became a significant alternative to grains in the years following World War II when as much as one million acres were planted. The seeded area peaked in 1965 at 1.35 million acres and has fluctuated over the past thirty years from a low of 370,000 acres in 1992 to a high of 1.25 million acres in 1979. In 1999, 520,000 acres of flaxseed were planted and 500,000 acres harvested producing 10.7 million bushels, 25 percent less than in 1998 and less than half the 1985 record of 22 million bushels. Manitoba contributed 25.9 percent of the Canadian flaxseed crop in 1999, down from 62.4 percent in 1992, when Manitoba was the largest producing province in Canada.

Yields averaged 21.4 bushels per acre in 1999, close to the10-year average of 21.5 bushels per acre, but above the 1998 level of 20.9 bushels per acre. The largest average yield on record was 25.0 bushels per acre in 1996.

The average price of flaxseed rose from $4.00 per bushel for the 1991 crop to $8.51 for the 1996 crop, but declined in each of the next three years to $5.08 per bushel for the 1999 crop. This was well below the 1974 record of $9.56 per bushel. Due to smaller production and lower prices, the value of the flaxseed crop declined by 51 percent from $110.0 million in 1998 to $54.4 million in 1999. The value of the flaxseed crop peaked in 1985 at $148 million. Estimated farm expenses for flaxseed production, including operating, labour and fixed costs, rose from $140.03 per acre in 1992 to $165.9 in 1999.

Marketing:

Annual cash receipts from flaxseed marketings rose from $88.7 million in 1996 to $135.5 million in 1997, but declined to $93.4 million in 1998 and $43.6 million in 1999. Manitoba's contribution to Canadian flaxseed receipts fell from 44.3 percent in 1997 to 33.3 percent in 1999. The 1999 flaxseed crop averaged about 43.7 percent oil and 22.4 percent protein, with a particularly high-quality oil containing 60.4 percent linolenic. Flaxseed marketings decreased from 14.5 million bushels in 1997/98 to 8.6 million bushels in 1999/2000. Flaxseed carryover increased from none at the end of 1997/98 to 2.2 million bushels at the end of the 1999/2000 crop year.

Processing:

Manitoba grows a high-quality, high-linolenic-content crop, which is favourable both for drying (polymerization) and health foods (omega-3). The province also grows a small area of low-linolenic, yellow-seeded flaxseed (solin) for oil, or for confectionery use in competition with sesame seed, mainly in Europe.

Flaxseed is processed into a variety of diverse products from breads to linseed oil for paints and concrete preservation to linoleum. Some processing has occurred from year to year at the CanAmera plants in Altona and Harrowby. Pizzey's Milling and Baking Co. at Angusville produces ground flax products, such as breads, muffins and pancake mixes.

Straw fibre, tow and waste, valued at $27 million in 1999, generally are used for industrial purposes, while135,000 tons of flax straw, valued at about $0.675 million in 1999, will be used for fine papers for cigarettes and currency.

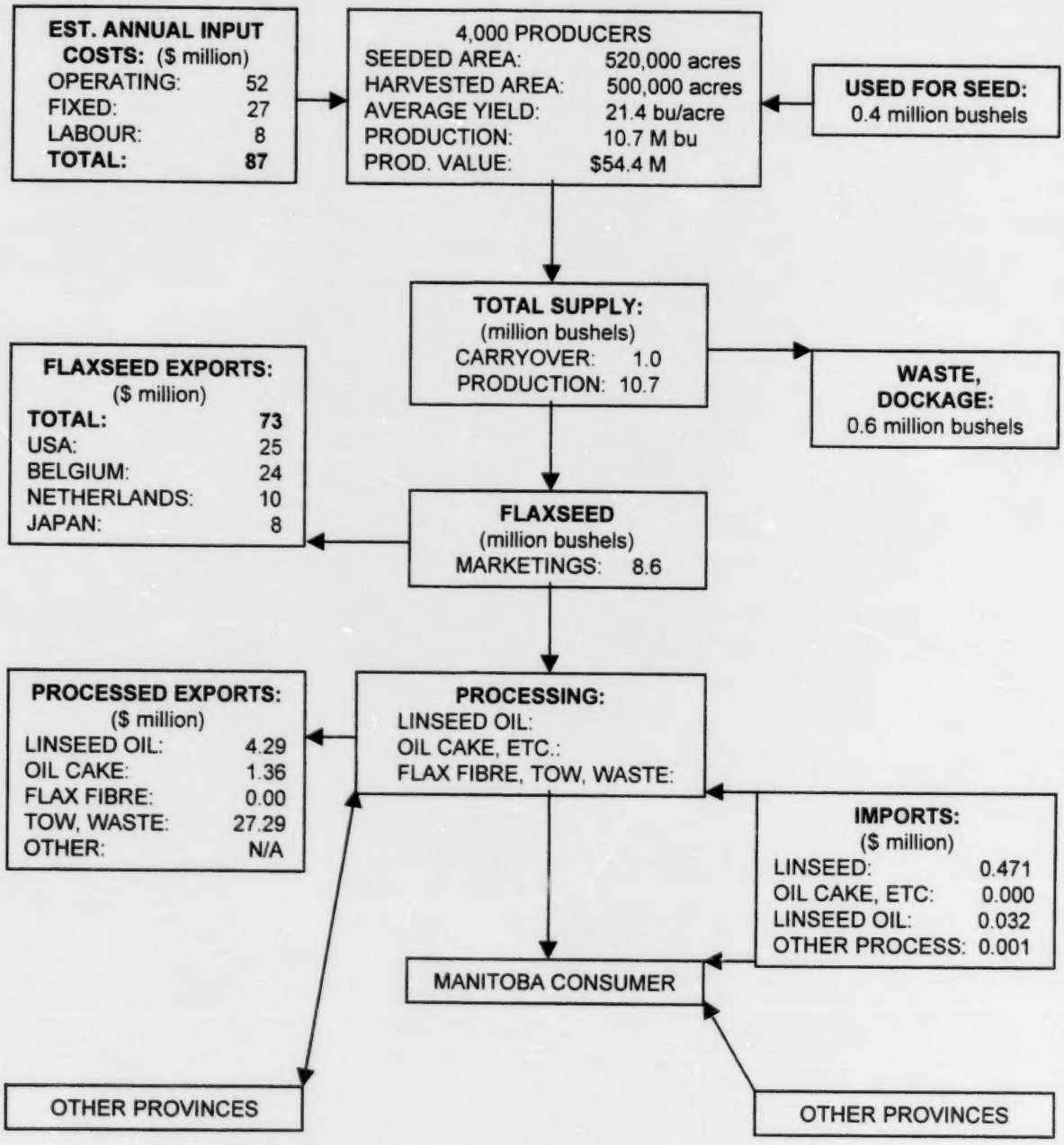
Trade:

Manitoba exported flaxseed, valued at $72.8 million in 1999, to 35 countries, such as Belgium, Japan, Netherlands and U.S.A. Linseed oil exports totalled $4.3 million in 1999, while oil-cake exports were valued at $1.4 million. Exports of flax fibre, tow and waste totalled $27.3 million. In 1999, flaxseed imports amounted to $0.47 million, while imports of linseed oil were valued at $0.03 million.

FLAXSEED AND FLAXSEED PRODUCTS SECTOR

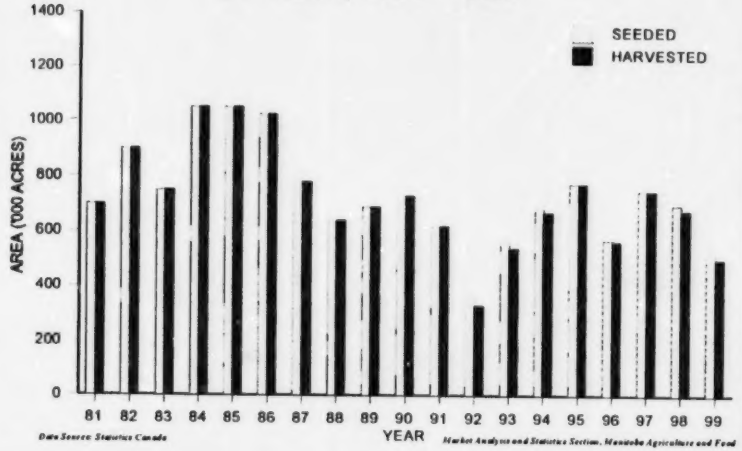
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	4,030	4,500	4,400	4,000	91
CROP PRODUCTION:					
Seeded Area ('000 acres):	570	750	700	520	74
% of Canada	38.9	36.4	32.3	26.0	
Harvested Area ('000 acres):	565	750	680	500	74
Yield/acre (bushels):	25.0	21.3	20.9	21.4	102
Production (million bu):	14.1	16.0	14.2	10.7	75
% of Canada	42.1	42.1	33.3	25.9	
Average Price ($/bu):	8.51	8.38	7.75	5.08	66
VALUE OF PRODUCTION ($ million):	120.0	134.1	110.0	54.4	49
ESTIMATED TOTAL EXPENSES ($/acre):	151.5	157.3	158.8	165.9	104
CASH RECEIPTS ($ million):	88.7	135.5	93.4	43.6	47
% of Canada	40.1	46.1	35.4	33.3	
EST. AV. QUALITY OF FLAXSEED CROP:					
1Canada Flaxseed Varieties:					
- Oil content (%)	43.7	43.9	43.4	43.7	101
- Protein content (%)	22.9	23.1	23.1	22.4	97
- Fatty acid content of oil (%) -Linoleic	14.4	14.7	14.1	14.3	101
- Fatty acid content of oil (%) -Linolenic	57.8	58.8	57.2	60.4	106
1Canada Solin (Low-Linolenic) Varieties:					
- Oil content (%)	45.5	43.9	42.9	43.3	101
- Protein content (%)	21.4	23.4	22.4	22.0	98
- Fatty acid content of oil (%) -Linoleic	71.2	71.0	70.6	72.3	102
- Fatty acid content of oil (%) -Linolenic	1.9	2.0	1.9	2.2	116
CROP DISPOSITION (million bu):	15.1	16.4	14.5	11.7	81
Marketings	13.3	14.5	11.1	8.6	77
Seed Requirements	0.5	0.5	0.4	0.3	75
Feed, Waste & Dockage	0.9	1.3	2.0	0.6	30
Carryover, July 31	0.4	0.0	1.0	2.2	220
EXPORTS ($ million):	134.3	180.3	160.0	105.8	66
Unprocessed	103.0	143.1	123.9	72.8	59
Processed	31.3	37.2	36.1	32.9	91
IMPORTS ($ thousand):	554.0	344.1	1,201.2	504.8	42
Unprocessed	153.0	124.4	1,196.0	471.4	39
Processed	401.0	219.7	5.2	33.4	642

FLAXSEED INDUSTRY CHART, 1999



DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

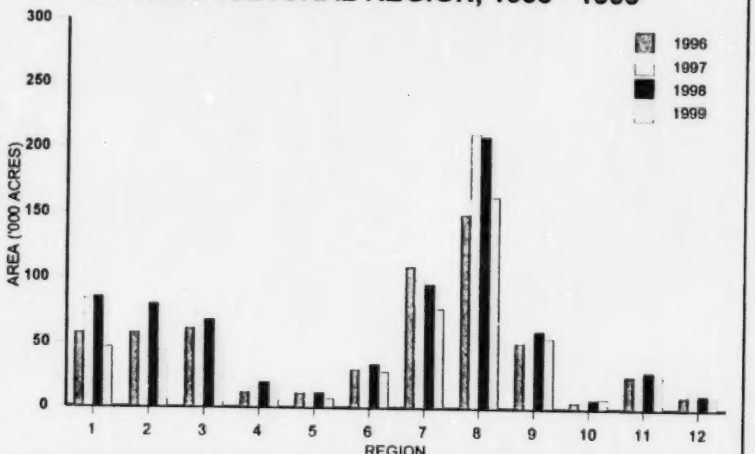
SEEDED & HARVESTED AREA OF FLAXSEED BY YEAR, 1981 - 1999



Data Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

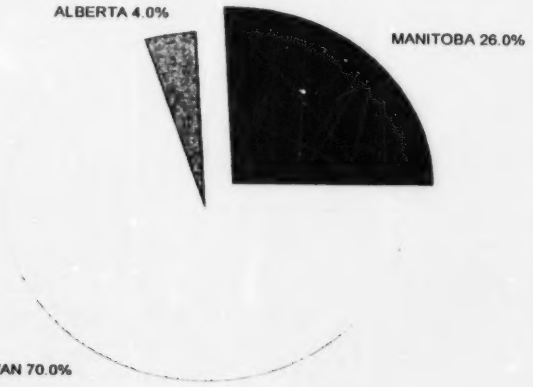
SEEDED AREA OF FLAXSEED BY AGRICULTURAL REGION, 1996 - 1999



Data Source: Statistics Canada, Manitoba Agriculture

Market Analysis and Statistics Section, Manitoba Agriculture and Food

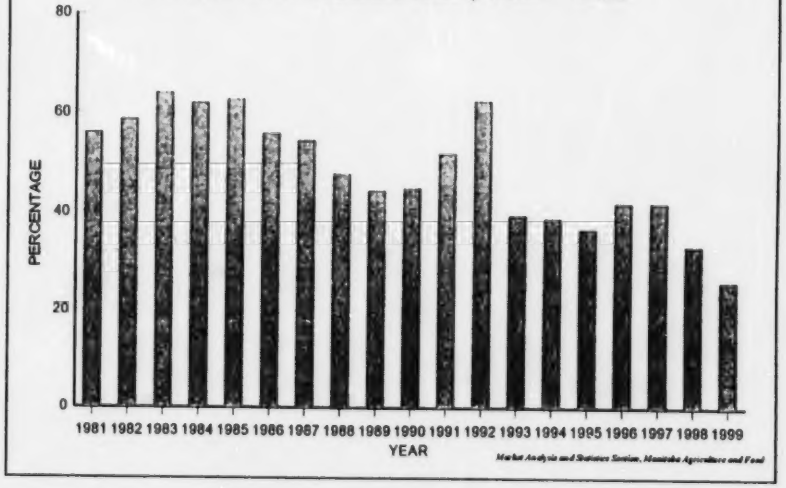
AREA OF FLAXSEED SEEDED BY PROVINCE 1999



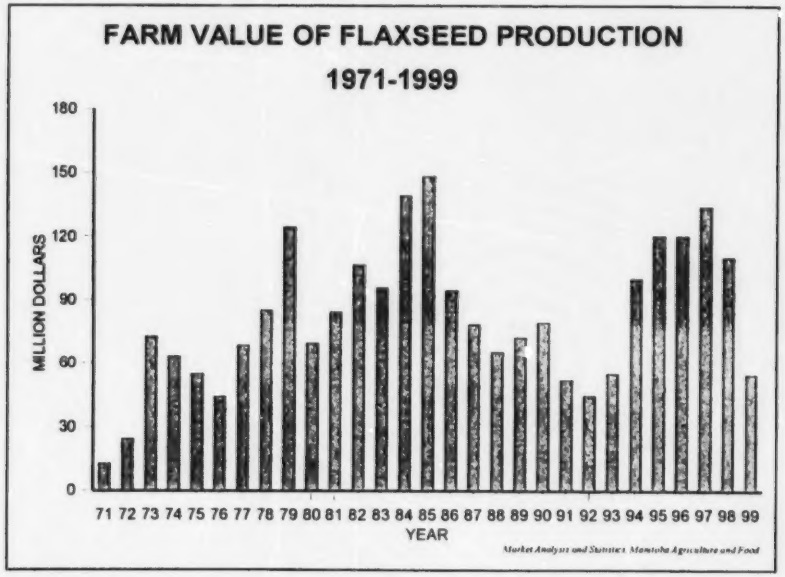
Source: Statistics Canada

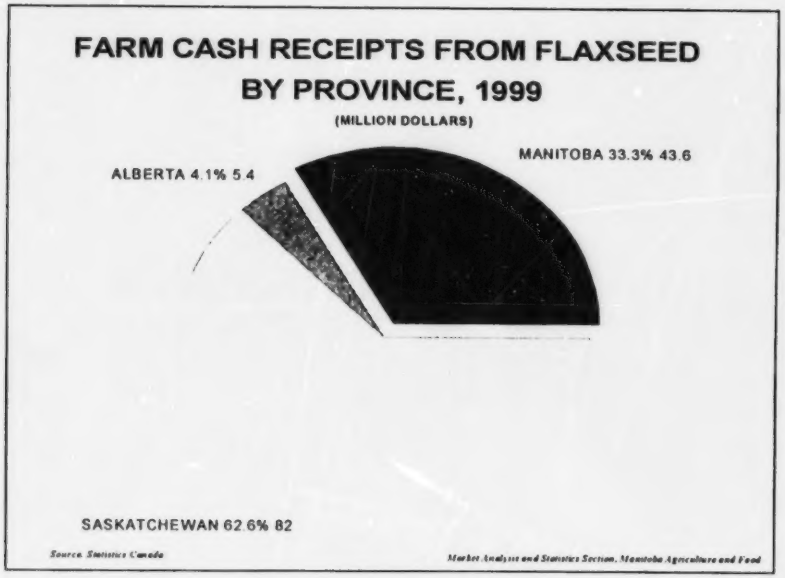
Market Analysis and Statistics Section, Manitoba Agriculture and Food

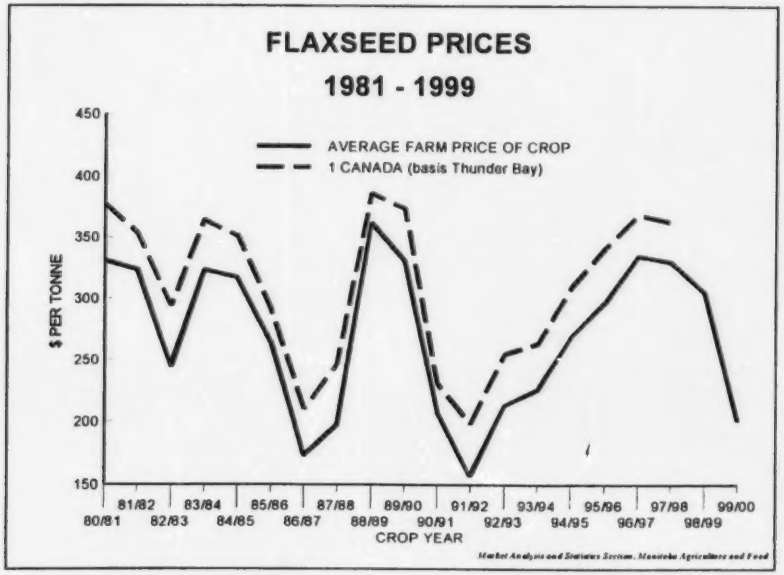
FLAXSEED PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981 - 1999

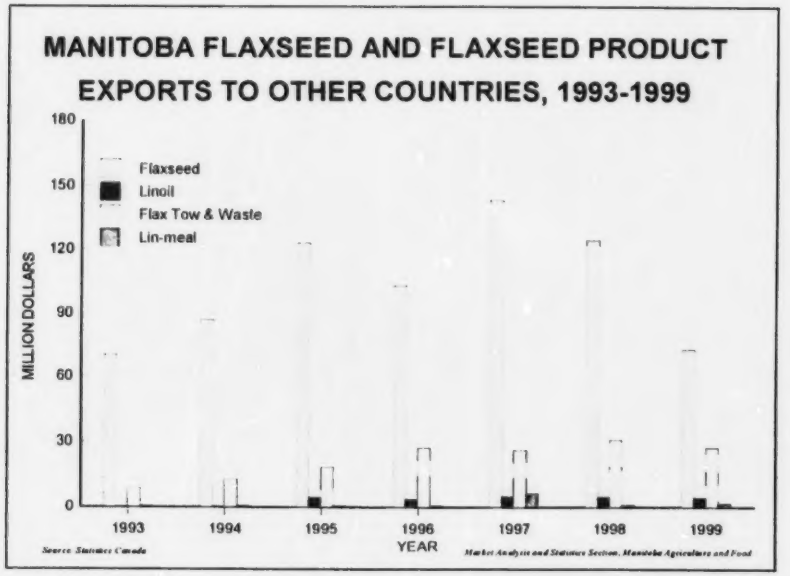


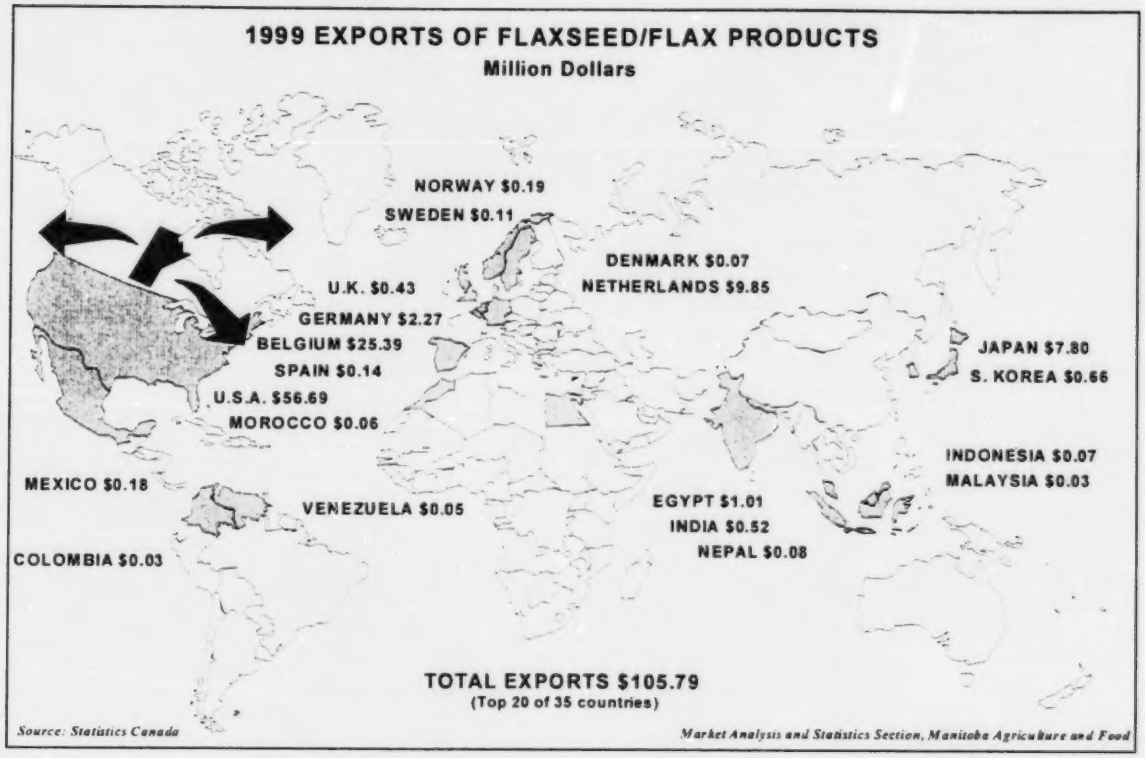
Market Analysis and Statistics Section, Manitoba Agriculture and Food

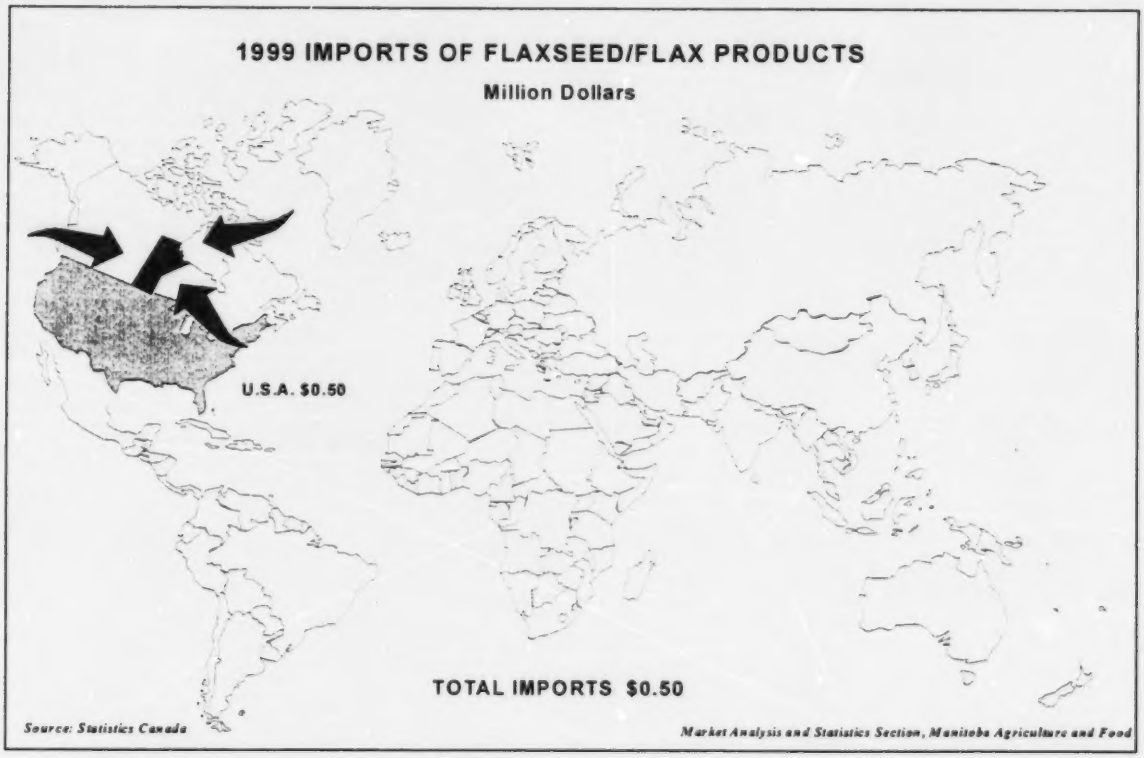

FARM VALUE OF FLAXSEED PRODUCTION
1971-1999
MILLION DOLLARS
180
150
120
90
60
30
0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99
YEAR
Market Analysis and Statistics, Manitoba Agriculture and Food


FARM CASH RECEIPTS FROM FLAXSEED
BY PROVINCE, 1999
(MILLION DOLLARS)
ALBERTA 4.1% 5.4
MANITOBA 33.3% 43.6
SASKATCHEWAN 62.6% 82
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

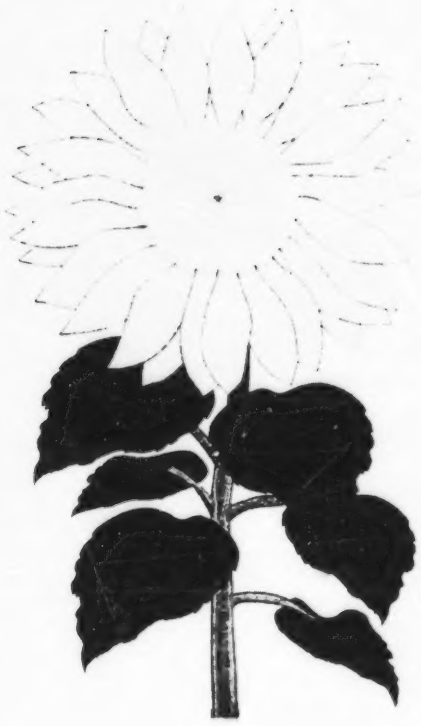

FLAXSEED PRICES
1981 - 1999
AVERAGE FARM PRICE OF CROP
1 CANADA (basis Thunder Bay)
$ PER TONNE
450
400
350
300
250
200
150
80/81 81/82 82/83 83/84 84/85 85/86 86/87 87/88 88/89 89/90 90/91 91/92 92/93 93/94 94/95 95/96 96/97 97/98 98/99 99/00
CROP YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MANITOBA FLAXSEED AND FLAXSEED PRODUCT
EXPORTS TO OTHER COUNTRIES, 1993-1999
Flaxseed
Linoil
Flax Tow & Waste
Lin-meal
MILLION DOLLARS
180
150
120
90
60
30
0
1993 1994 1995 1996 1997 1998 1999
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 EXPORTS OF FLAXSEED/FLAX PRODUCTS
Million Dollars
NORWAY $0.19
SWEDEN $0.11
DENMARK $0.07
NETHERLANDS $9.85
U.K. $0.43
GERMANY $2.27
BELGIUM $25.39
SPAIN $0.14
U.S.A. $56.69
MOROCCO $0.06
JAPAN $7.80
S. KOREA $0.66
INDONESIA $0.07
MALAYSIA $0.03
MEXICO $0.18
VENEZUELA $0.05
EGYPT $1.01
INDIA $0.52
NEPAL $0.08
COLOMBIA $0.03
TOTAL EXPORTS $105.79
(Top 20 of 35 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF FLAXSEED/FLAX PRODUCTS
Million Dollars
U.S.A. $0.50
TOTAL IMPORTS $0.50
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

SUNFLOWER SEED SECTOR



SUNFLOWER SEED SECTOR PROFILE

Production:

The largest producer of the three Prairie Provinces, Manitoba has been growing sunflower seed since the early 1940s. Less than 100,000 acres were planted until 1971, when the area rose to 155,000 acres from 65,000 acres a year earlier. The seeded area peaked in 1979 at 380,000 acres, but dropped to a 15-year low of 57,000 acres in 1986 as lower prices and problems due to weather, disease and insects discouraged producers from growing sunflowers. Prices and varieties improved and the seeded area increased in the early 1990s making sunflowers a viable alternative to grains in the southern part of the province. In 1999, 140,000 acres of sunflowers were planted and 125,000 acres harvested to produce 182.8 million pounds of seed, 3.8 percent below the 1998 crop and only 40 percent of the record 1979 crop of 460.0 million pounds. Manitoba produced 68 percent of the Canadian sunflower seed crop in 1999, down from a high of 96.0 percent in 1981.

Yields averaged 1,460 pounds per acre in 1999 compared to a 10-year average of 1,357 pounds per acre and 1,520 pounds per acre in 1998. The largest average yield on record was 1,586 pounds per acre in 1990.

The average price of sunflower seed rose from $0.10 per pound for the 1991 crop to $0.175 per pound for the 1998 crop, but decreased in 1999 to $0.140 per pound. Recent prices were well below the record of $0.205 per pound in 1974. The total value of the Manitoba sunflower seed crop peaked in 1979 at $50.6 million. The value declined from $33.2 million in 1998 to $25.8 million in 1999.

Estimated farm expenses for sunflower seed production, including operating, labour and fixed costs, increased from $175.50 per acre in 1997 to $218.61 in 1999.

Marketing:

Annual cash receipts from sunflower seed marketings rose from $12.4 million in 1997 to $22.2 million in 1999. Manitoba's share of Canadian sunflower seed receipts fell from 89.9 percent in 1992 to 67.0 percent in 1996, but rose to 75.0 and 73.5 percent in 1998 and 1999. In 1999, about one quarter of sunflower seed production was of oil types for crushing and bird feed with the remainder comprised of larger seed types used for confectionery or bird feed. This was a reversal of historic patterns when oil was the major product.

Processing:

Sunflower seeds are processed into oil, roasted and salted or baked into bread products for human consumption. The residual oil-cake or high-protein meal is used for animal feed. Crushing occurs periodically at the CanAmera plant in Altona. Companies, such as Superior Harvest Foods and Sunny Day Products in Winkler, Nestibo Agra in Deloraine, Snow Fire Seeds in Domain and Scott Bathgate, Tasty Seeds and United Grain Growers in Winnipeg, process confectionery seed. Both confectionery types (20%) and oil types (80%) are cleaned and/or mixed with other seeds and bagged for bird feed.

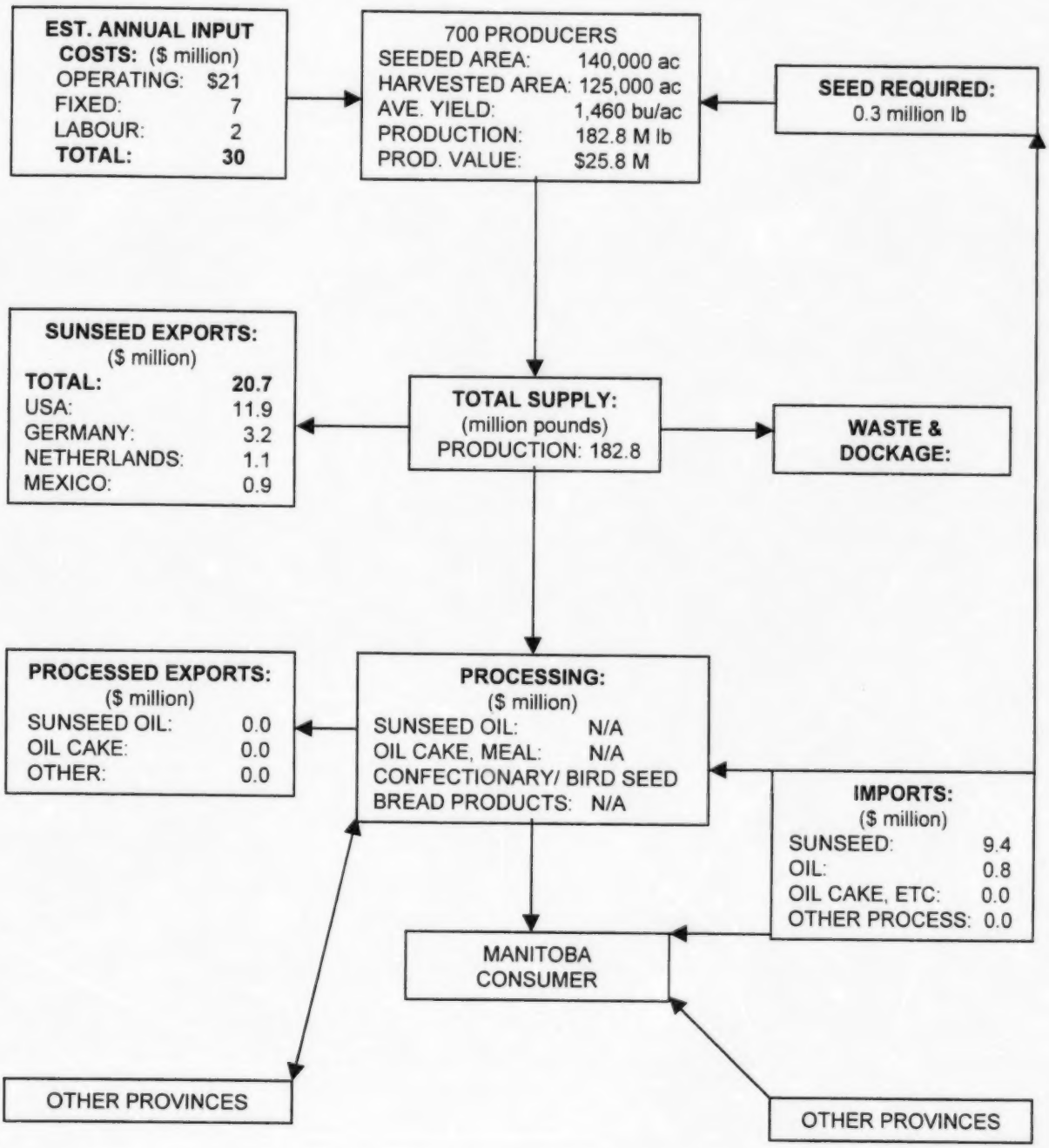
Trade:

Manitoba exported sunflower seed valued at $20.7 million in 1999 to 34 countries, such as United States, Germany, Mexico and The Netherlands. Due to limited crushing in the province, there were no sun-oil exports in 1995, 1996, 1998 and 1999, but there were some exports of sun-oil in 1997 amounting to $10,600. Oilcake exports amounted to $39,000 in 1998, but there was none in 1999. Seed may be imported from the United States for planting purposes or to meet processors needs. In 1999, seed imports totalled $9.4 million. Imports of oil came mainly from the United States and were valued at $0.8 million in 1999.

SUNFLOWER AND SUNFLOWER PRODUCTS SECTOR

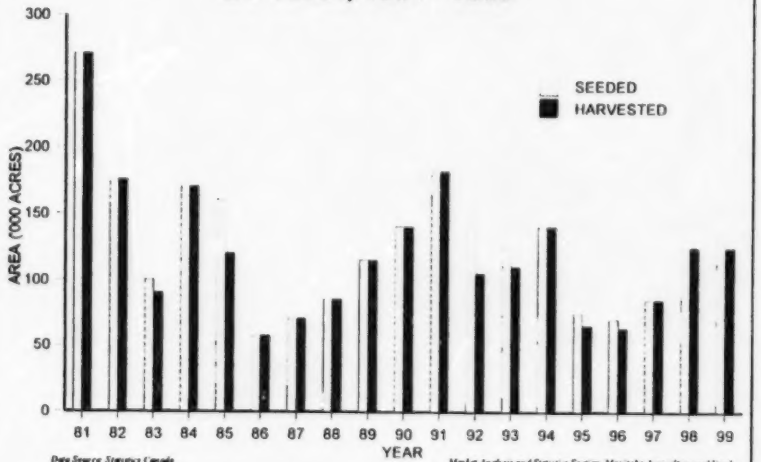
	1996	1997	1998	1999[P]	'99 as a % of '98
Estimated Number of Farms	380	400	600	700	117
CROP PRODUCTION:					
Seeded Area ('000 acres):	70	85	125	140	112
% of Canada	75.3	68.0	73.5	66.7	
Harvested Area ('000 acres):	63	85	125	125	100
Yield/acre (pounds)	1,320	1,235	1,520	1,460	96
Production (million pounds):	83.1	105.0	190.0	182.8	96
% of Canada	68.7	73.2	77.1	68.0	
Average Price ($/pound):	0.156	0.146	0.175	0.140	80
VALUE OF PRODUCTION ($ million):	13.0	15.3	33.2	25.8	78
ESTIMATED TOTAL EXPENSES: ($/acre)	180.56	175.50	188.35	218.61	116
CASH RECEIPTS ($ million):	13.1	12.4	19.7	22.2	113
% of Canada	67.0	72.3	75.0	73.5	
EXPORTS ($ million):	15.7	15.6	23.8	20.7	87
Sunflower seed	15.5	15.5	23.8	20.7	87
Processed (oil, oil-cake, bird seed, etc.)	0.2	0.08	0.04	0	
IMPORTS ($ million):	6.5	5.2	6.5	10.3	158
Sunflower seed	5.7	4.6	5.8	9.4	162
Processed (oil, oil-cake)	0.8	0.6	0.7	0.8	114

SUNFLOWER SEED INDUSTRY CHART, 1999



DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

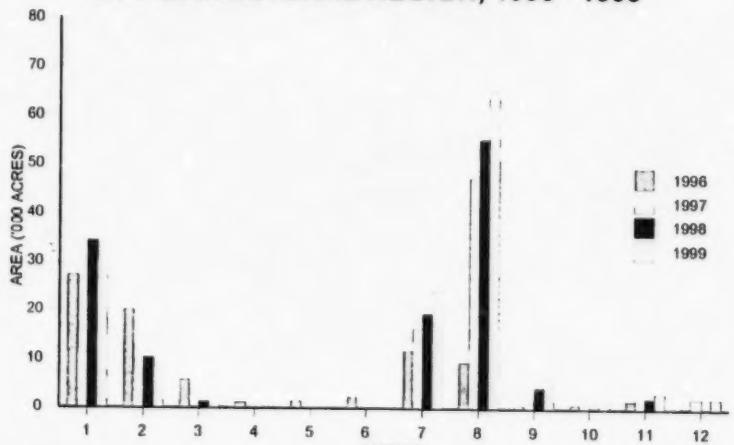
SEEDED & HARVESTED AREA OF SUNFLOWERS BY YEAR, 1981 - 1999



Data Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

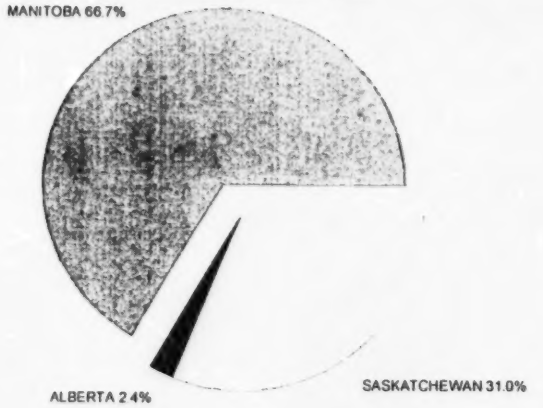
SEEDED AREA OF SUNFLOWERS BY AGRICULTURAL REGION, 1996 - 1999



Data Source: Statistics Canada, Manitoba Agriculture

Market Analysis and Statistics Section, Manitoba Agriculture and Food

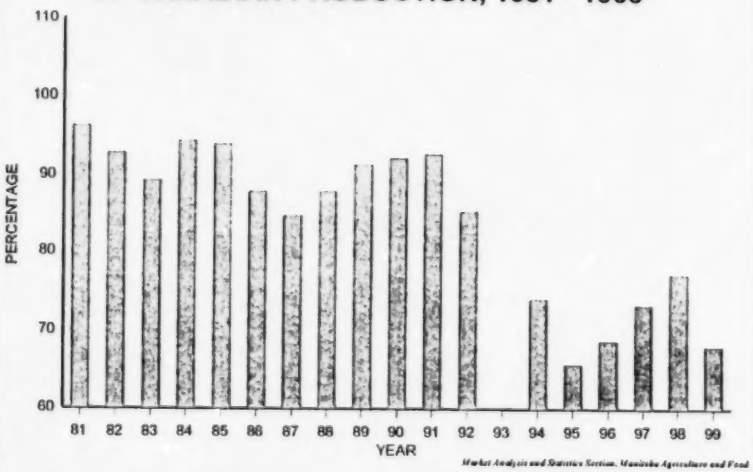
AREA OF SUNFLOWERS SEEDED BY PROVINCE, 1999



Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

SUNFLOWER PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981 - 1999



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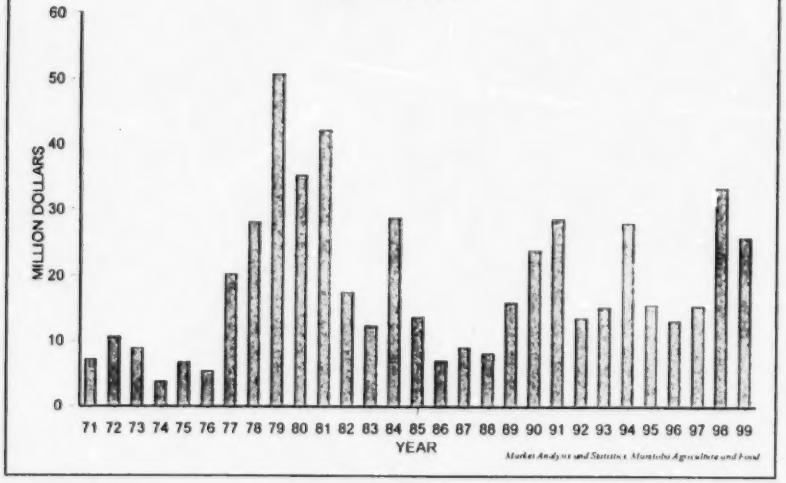
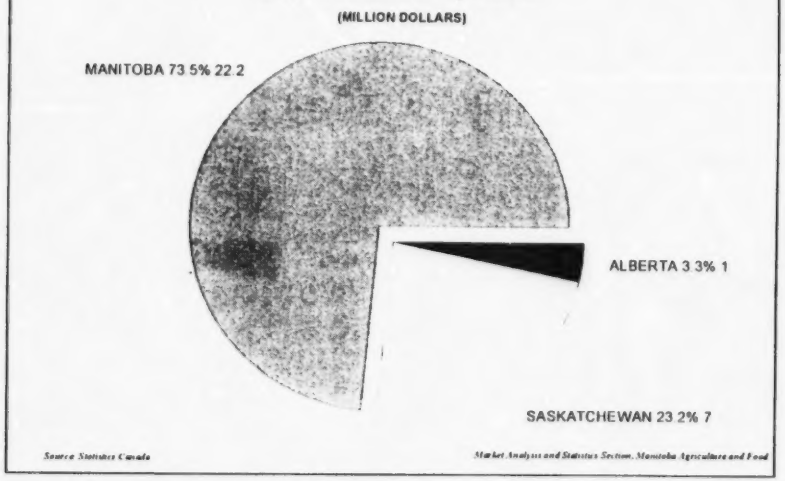
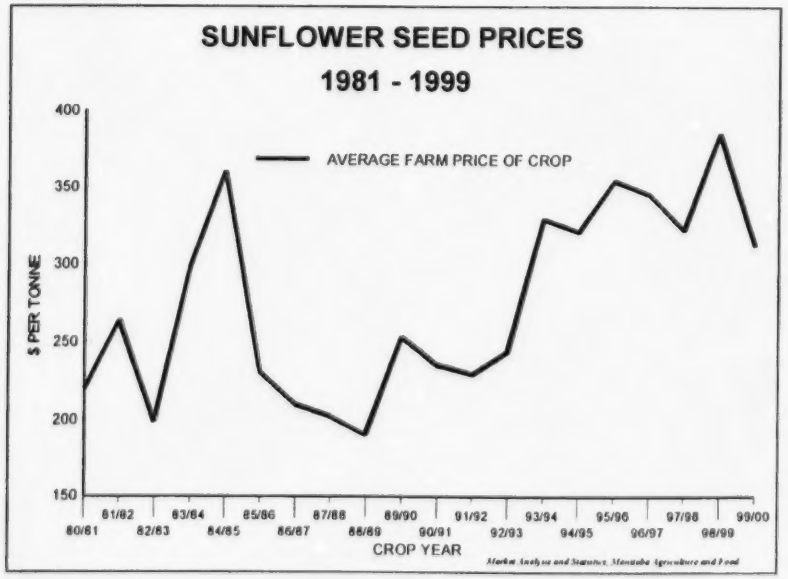
FARM VALUE OF SUNFLOWER PRODUCTION 1971-1999



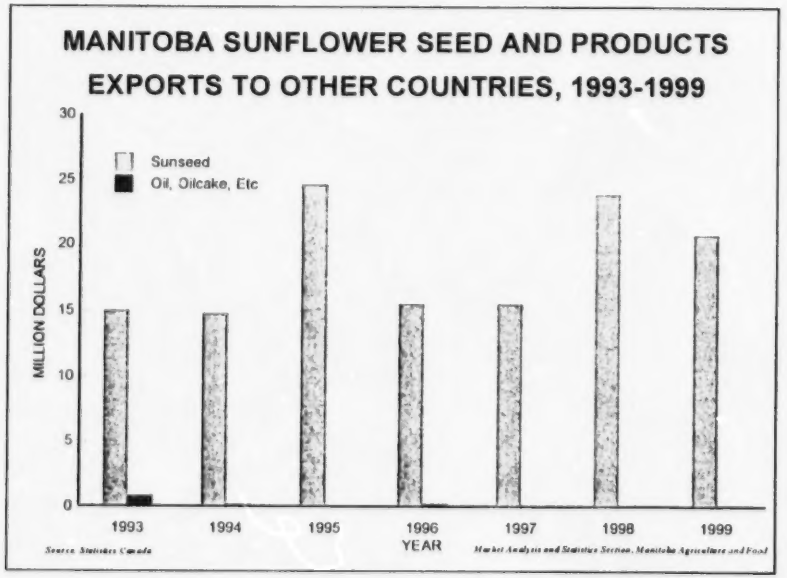
FARM CASH RECEIPTS FROM SUNFLOWERS BY PROVINCE, 1999

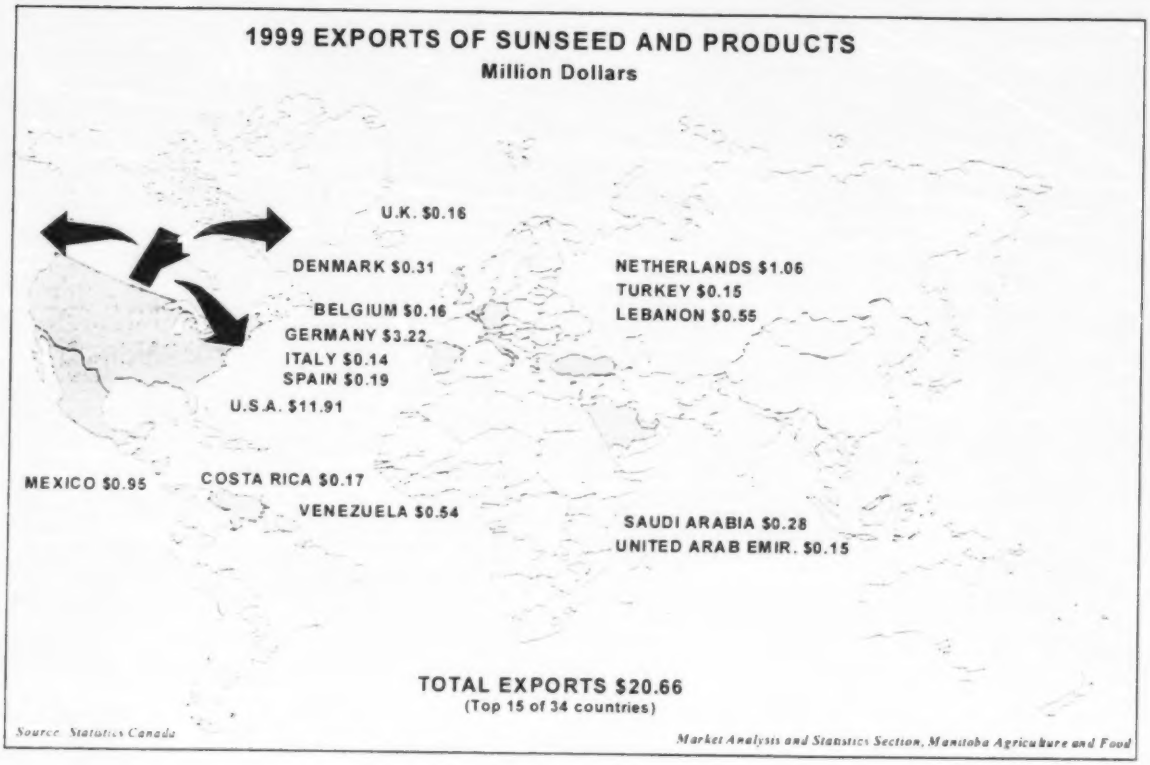

(MILLION DOLLARS)
MANITOBA 73 5% 22 2
ALBERTA 3 3% 1
SASKATCHEWAN 23 2% 7
Source Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

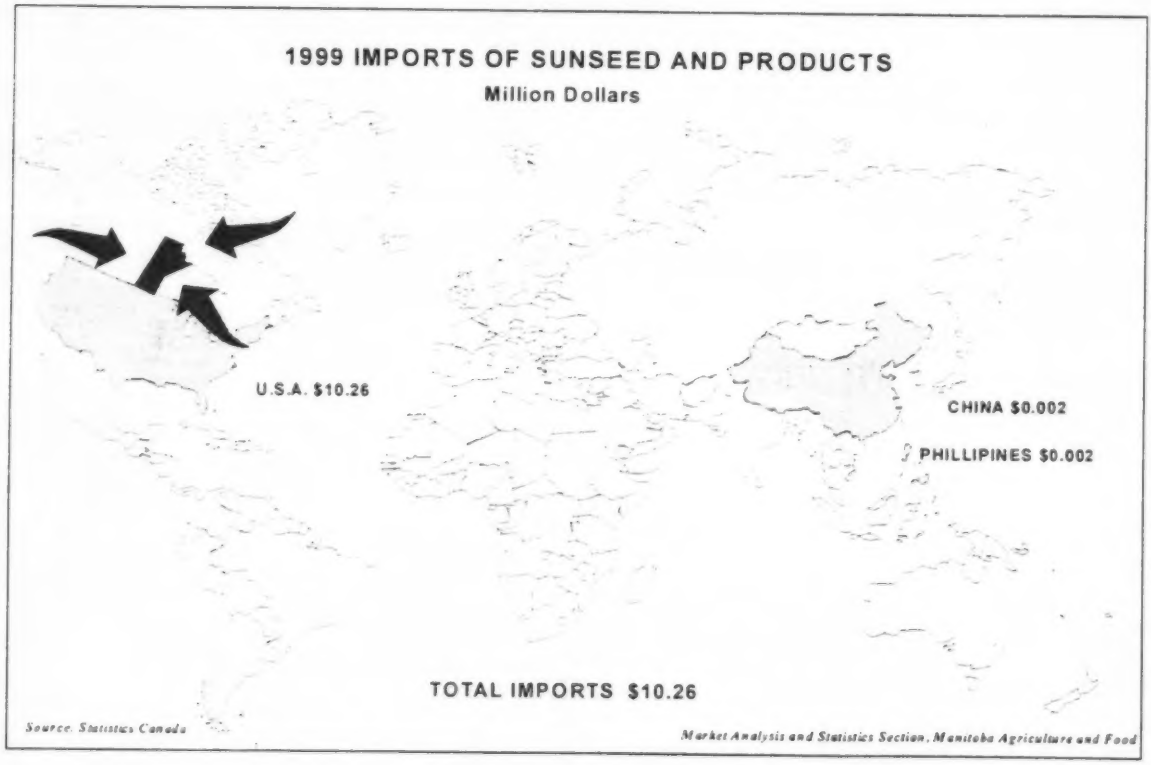
SUNFLOWER SEED PRICES 1981 - 1999



MANITOBA SUNFLOWER SEED AND PRODUCTS EXPORTS TO OTHER COUNTRIES, 1993-1999




1999 EXPORTS OF SUNSEED AND PRODUCTS
Million Dollars
U.K. $0.16
DENMARK $0.31
BELGIUM $0.16
GERMANY $3.22
ITALY $0.14
SPAIN $0.19
U.S.A. $11.91
NETHERLANDS $1.06
TURKEY $0.15
LEBANON $0.55
MEXICO $0.95
COSTA RICA $0.17
VENEZUELA $0.54
SAUDI ARABIA $0.28
UNITED ARAB EMIR. $0.15
TOTAL EXPORTS $20.66
(Top 15 of 34 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


1999 IMPORTS OF SUNSEED AND PRODUCTS
Million Dollars
U.S.A. $10.26
CHINA $0.002
PHILLIPINES $0.002
TOTAL IMPORTS $10.26
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food